WEST ISLES FEASIBILITY STUDY

A STUDY TO ASSESS THE FEASIBILITY OF ESTABLISHING A NATIONAL MARINE PARK IN THE WEST ISLES AREA OF THE BAY OF FUNDY, NEW BRUNSWICK

TASK REPORT

Parks Canada Parcs Canada

Tourism New Brunswick Tourisme Nouveau-Brunswick

TOURISM DEVELOPMENT PLAN

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FOREWORD

The West Isles Feasibility Study was initiated by the federal Minister of the Environment responsible for Parks Canada and the New Brunswick Minister of Tourism in November, 1983. The purpose of the study is to assess the feasibility of establishing a national marine park in the West Isles area of the Bay of Fundy.

The West Isles Feasibility Study is being conducted in three phases. Phase I is an assessment of the technical feasibility of establishing a national marine park in the West Isles area, from the perspective of Parks Canada and Tourism New Brunswick. If Ministers decide to proceed with the study, Phase II would involve extensive public consultation to provide the local public with the opportunity to become directly involved in the process to decide whether or not the West Isles proposal is feasible. The purpose of Phase III would be to analyse the results of the two preceeding phases, and to prepare a final report based on the findings, with recommendations for a future course of action.

In the process of completing Phase I, nine individual studies were conducted to investigate specific aspects of the feasibility assessment, all of which are summarized in the Phase I report. These nine studies include the following:

1. Recommended Resource Management Guidelines
2. Institutional and Administrative Arrangements
3. Optional Visitor Use Concepts
4. Transportation Analysis
5. Tourism Development Plan
6. Socio-Economic Impact Study
7. Historical/Archaeological Concerns and Opportunities
8. Land Ownership Inventory
9. Analysis and Summary of Public Comments

Copies of the above reports are available upon request from the following addresses:

Department of Tourism,
Recreation and Heritage*
P.O. Box 12345
Fredericton, New Brunswick
E3B 5C3
Phone: (506) 453-2624

Parks Canada
10 Wellington Street
Hull, Quebec
K1A 1G1
Phone: (819) 994-2696

* Throughout this report the former title Tourism New Brunswick has been used. The correct title is now the Department of Tourism, Recreation and Heritage.

Table 1

Location	Establishment	# Units	Seasonal/ Year round	Total Units
St. George	Lawson's Motel & Cabins	12	S	12
Deer Island	45th Parallel Motel	10	S	
	Hartford's Guest Home	3	S	13
Campobello	Friars Bay Motor Lodge	10	Y	
	Parkway Drive-Inn	3	S	
	Ponderosa Motel & Restaurant	11	S	
	Quoddy View Cabins	7	S	
	Owen House	9	S	40
Black's Harbour	Wrights Guest Home	4	Y	4
Grand Manan	Cherry Nook Cottage	1	S	
	Cliff-by-the Sea Cottages	4	S	
	Compass Rose	9	S	
	Co-Zee Cottages	1	S	
	Drop Anchor Cabins	6	Y	
	Grand Harbour Inn	6	S	
	Marathon Inn	34	S	
	Moonlight Bay Cabins	3	S	
	Shore Crest Lodge	11	Y	
	Spray Kist Cottages	4	S	
	Surfside Motel	23	Y	
	Abiding Place	2	S	
	Wooster's Guest Home	5	Y	109

FOREWORD

A National Marine Park of international stature could contribute annually $831,000 in revenue and could attract 141,300 visitors (year 10, Option III) to the Fundy Isles Destination Area.[1] Furthermore, it would allow for the physical limitations of the Islands by establishing transportation links with other area attractions, such as St. Croix Heritage River and Ministers Island. Maximum tourism benefits would extend beyond the West Isles and Charlotte County to the rest of New Brunswick and to the State of Maine. In total, a maximum of 164 construction jobs would be created and a maximum of 5,100,000 development dollars would be spent depending upon the development Option chosen.[2]

Three park development options are proposed. In Option I Green Point is the centre of major park activities and Deer Island is subject to minor development. Option II concentrates on the development of Deer Island and Campobello Island as sites for visitor reception facilities with only minor development planned for Green Point. Option III is similar to Option II in that locations of the major visitor reception facilities are decentralized along the coast of Charlotte County.

The development of the National Marine Park in the archipelago to the east of Deer Island is critical to the tourism development plan. Without the proposed park the level of visitation simply will not exist. A marine park, unique in Canada and North America, international in profile and reputation, is the drawing card.

Successful tourism development is dependent upon both the creative and financial contributions of the private sector. In return, the private sector will reap maximum benefits both in terms of employment created and revenue generated.

1. D.P.A. Consulting, Proposed West Isles National Marine Park Socio-economic Impact Study, March 1985.

2. Ibid

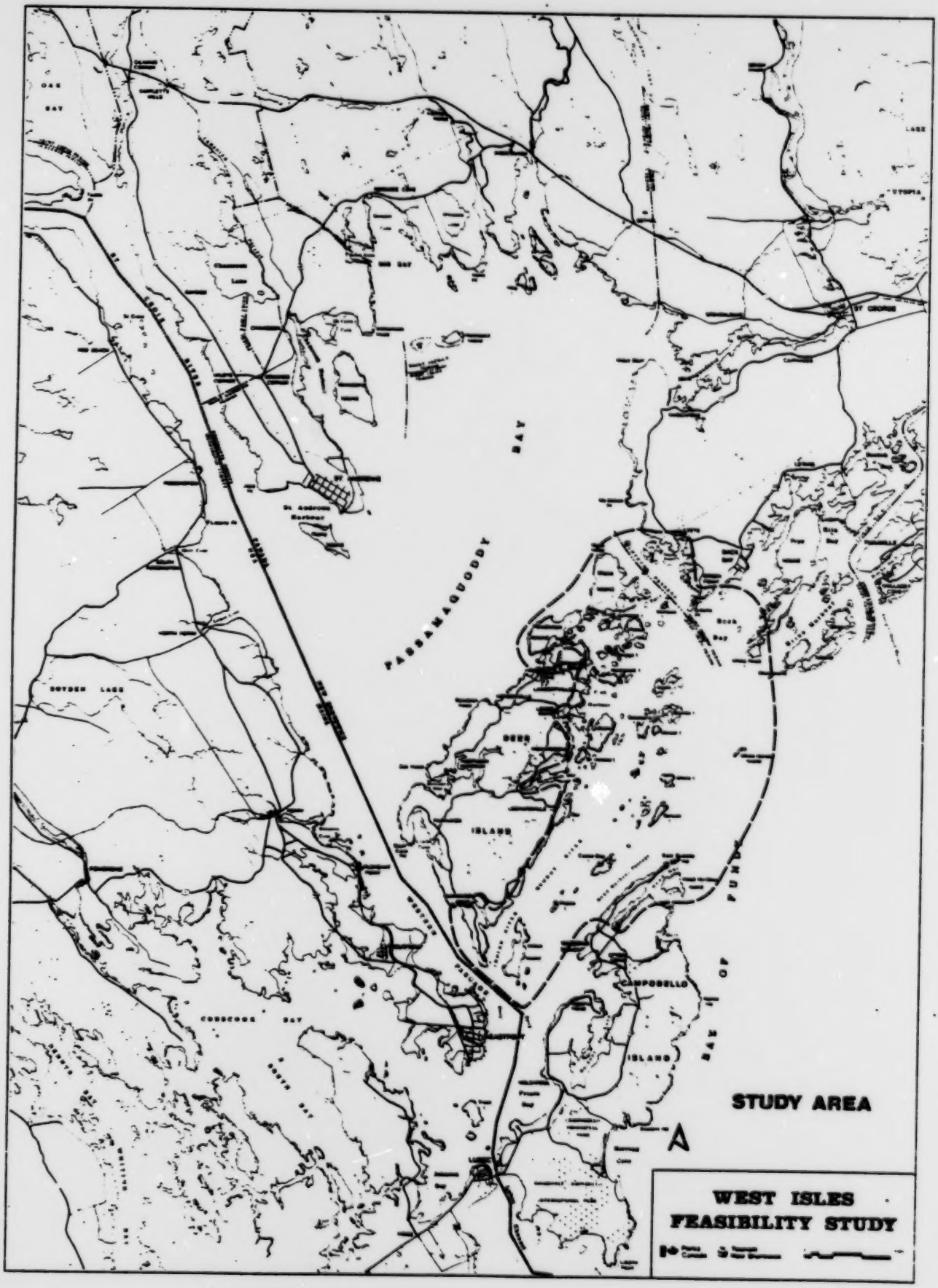
Table 1

Location	Establishment	# Units	Seasonal/ Year round	Total Units
Pennfield	McKay's Restaurant & Motel	8	Y	
	Smitty's Motel	27	Y	35
Pocologan - Lepreau	Cherry Tree Cabins	4	S	
	Clipper Ship Beach Motel	18	S	
	Fundy Motel & Cottages	16	S	
	Tide Rock Motel, Cottages & Rest.	12	S	50
Utopia	Lake Utopia Motel & Cabins	11	S	8

Total number of Establishments: 49 (794 units)
Total year round : 15 (253 units)
Total season : 34 (341 units)

From Table 1 it is quite apparent that at present the areas immediately adjacent to the national marine park study area have relatively few accommodation units. St. George, Deer Island and Campobello Island have nine accommodation establishments offering a total of sixty-nine units. This represents only 8.7% of the accommodation units in the county. The proposed developments on Campobello Island may well change this mix quite substantially.

1. New Brunswick Canada Travel Guide - 1984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I. INTRODUCTION

Tourism is the third largest industry in New Brunswick. Compared to manufacturing and processing sectors, tourism is not consumptive of resources, pollutive of the environment or capital intensive. Tourism has shown high immunity to economic fluctuations. Despite reduced amounts of consumer's disposable income during the recent recession, tourism has exhibited moderate sustained growth. This is especially impressive when one considers the ill effects the recession has had on other sectors of the economy.

New Brunswick is recognized as a tourism destination. Tourism bodies, both governmental and private sector, are expending time and monies to create a positive image. One of the more viable destinations within New Brunswick is the "Fundy Isles Destination Area." The National Marine Park is only part of a comprehensive development package for this area.

Area residents' concerns, perceptions and actions with respect to such plans may determine the success of this future tourism development. A strong concern expressed by area - residents is the impact of a national marine park upon their lifestyle. They should consider the fact, however, that whether a national marine park is established in the study area or not, tourism visitation will increase. The development proposed by the Campobello Development Company for Campobello Island will result in increased visitation. Unless this development includes an effective control mechanism such as that provided by a national marine park Deer Islanders are in danger of acquiring all of the negative effects and few of the benefits. Uncontrolled increased boat traffic and increased unsupervised visitation will disturb area resident's lifestyle.

1.1 Tourist Sector Strategy for New Brunswick

In 1981 the New Brunswick Department of Tourism developed a document called "A Tourist Sector Strategy for New Brunswick". which provided the overall direction for the industry for the five year period 1982-1986. The recommended courses of action in the strategy are fundamental to tourism industry viability. The strategy is particularly appropriate to the development of a national marine park in the West Isles and provides both direction and "raison d'être."

This strategy is primarily concerned with the economic aspects of tourism development. The emphasis, while not disregarding social, environmental or cultural considerations, is oriented towards the contribution which the industry presently makes and can make to the economy of New Brunswick. Basically the strategy recommends initiatives to increase jobs and incomes according to the following priorities.

First - Direct stimulation of demand
- Increase plant quality

Second - More attractions

Third - Growth in tourist services (where needed)

1. A Tourist Sector Strategy for New Brunswick, 1981

The ultimate objective then is to "encourage development of the New Brunswick tourism sector in order to accelerate and realize the maximum net economic benefit to provincial residents through increased output and improved productivity in the sector."[1]

From page 53 of the Strategy

Now and during the 1980's tourists will increasingly seek out specific areas as destinations which offer a complete vacation package.

A tourist destination area is a specific area of New Brunswick which draws and retains a significant number of pleasure travellers for overnight and extended stays by virtue of its attractions. These attractions must be complemented by adequate services and facilities, population base and transportation links, the quality and scope of which are sufficient to permit successful marketing to an identified market.

From page 55 of the Strategy:

Tourist naturally concentrate their time in well known vacation areas as is demonstrated by the perennial popularity of St. Andrews as a resort community of international reputation.

Rising travel costs are causing more people to seek total destination areas so that less time is spent in transit permitting greater emphasis on activities within an area. The proximity of the Fundy Isles to the U.S.A. and the growing popularity of its diverse features have stimulated increased development of tourism facilities.

[1]Canada - New Brunswick Tourism Subsidiary Agreement

Destination areas are easier to market. They are easier for the traveller to locate and they are easier to describe.

One of the more viable destination areas in the Province of New Brunswick as defined in the Sector Strategy is the "Fundy Isles Destination Area" which includes much of coastal Charlotte County including Deer, Campobello and Grand Manan Islands and thus the entire study area.

Consistent with the previously noted excerpts from the Sector Strategy, two recommendations were made which are central to this tourism development plan:

"Support for historical development of the St. Andrew's area should receive a high priority. The emphasis should be on maintaining the character of the town but potential to capitalize on Minister's Island should be explored."[1]

"A marine national park in the Fundy Isles area scores highly in regards to location, compatibity with image and significance. Depending on suport for such a concept from the local residents, the Province should actively pursue this concept with Parks Canada."[2]

1. A Tourist Sector Strategy for New Brunswick, N.B. Dept. of Tourism, 1981.
2. Ibid

1.2 Global Strategy for Charlotte County

The National Marine Park Feasibility Study is not proceeding in a vacuum. The project is viewed by Tourism New Brunswick as one part of a comprehensive development for the Fundy Isles Destination Area. That is, however, not to diminish the importance of the potential national marine park which would, by virtue of its uniqueness and international profile, be a drawing card which would contribute materially to the success of the other components.

Other attractions and potential developments which will be part of the total package include the development of the St. Croix River as a heritage river, development of the full potential of St. Andrews, potential development of Ministers Island, the Roosevelt International Park and Herring Cove Provincial Park on Campobello Island ongoing developments by Campobello Development Co. on Campobello, and promotion and development of Grand Manan as a tourist attraction.

1.3 Goals

There are various goals for tourism development in the area covered by this tourism development plan.

Economic Goals

- To increase the economic potential and employment opportunities for area residents by creating opportunities for added income and additional jobs.
- To provide an alternate source of income in an area traditionally dependent upon the fishing industry
- To identify tourism development opportunities in the area in relation to the development of a national marine park in the West Isles area.
- To contribute to the general viability of the Fundy Isles Tourism Destination Area.

Social/Cultural Goals

- To enable area residents to retain as much the social/cultural identity of their area as they desire while still allowing them to participate in economic development.
- To contribute towards the continuing viability of Deer Island as a community in terms of population and economic actions.

Industry goals

- To allow development of the area tourism industry while assuring that there is no disruption of the commercial fishery.
- To provide support for the Fundy Isles Tourism Association.

1.4 Tourism and the Fishing Industry

One major overriding concern of a significant segment of the population in the study area is the effect that the establishment of a national marine park would have on the commercial fishery. The fisherman are concerned that the greatly increased number of visitors to the area would cause increased boat traffic around the weirs and that divers would disturb the weirs.

The commercial fishery, more specifically the weir fishery for herring, is the major source of employment in the Fundy Isles. There are several fish processing plants in Deer Island including a sardine packing plant at Fairhaven (Connors Bros.). Persistant resistance to the idea of a marine park adjacent to Deer Island has come from weir fishermen through their association - The Fundy Weir Fisherman's Association, although not all weirman are totally against the idea, preferring to wait and make a decision on more concrete proposals.

There is no reason that the commercial fishery and the tourism industry cannot productively co-exist. The commercial fishery is very cyclical in nature and seems to run on a boom or bust cycle. A viable tourist industry would provide supplemental income which would smooth out the bumps and provide alternate employment for these unable to enter the fishing industry. It is unlikely that the tourism industry would ever supplant the commercial fishery as the major employer but it could contribute substantially to the economic health of the area.

2. INVENTORY

An important aspect of any tourism planning exercise is an inventory of all exisitng tourism related facilities, services and attractions and an analysis of that inventory in order to evaluate level of use, unused capacity, general quality and applicability and accessability in relation to the exercise.

In terms of this planning exercise, the area considered in the inventory was Charlotte County. It could be argued that Saint John would have an influence especially in the area of accommodations as it is approximately a one hour drive from the study area and Grand Manan services and attractions may have only marginal applicability because of constrained accessibility to the study area. Certain accommodations and services in Maine will be an important factor particularly in Calais, Eastport and Lubec. However, the State of Maine is outside the mandate of this plan which will deal with potential development in New Brunswick.

Recent announcements about proposed developments on Campobello Island have introduced an unknown factor into the assessment process. Although no facilities have been built, approximately 4,000 acres of land have been acquired, land development has commenced, and the project developers are actively selling sites and promoting development. Should this development proceed as is currently being described, it will have a profound affect upon the Marine Park Study Area whether a park is built or not. Given the time requirements for construction of facilities associated with a national marine park, should it proceed, many of the proposed new initiatives for Campobello Island could be in place.

2.1 Hotel, Motels, Bed and Breakfast

In Charlotte County there is a full range of roofed accommodation including hotels, motels, inns, and bed and breakfast establishments. They are distributed along the coast of the County and vary greatly in quality and services offered.

Table 1 - Accommodation Inventory

Location	Establishment	# Units	Seasonal/ Year round	Total Units
St. Stephen	Better Duck Inn Motor Court	18	S	
	Fundy Line Motel	41	Y	
	Haun's Holiday Farm	3	S	
	Hi-way Motel	10	Y	
	Irvine House	3	S	
	Scoodic Motel	14	Y	
	Wandlyn Inn	49	Y	
	White Swan Motel	10	Y	128
Oak Bay	Bay Shore Waterfront Cottages	2	S	2
St. Andrews	Algonguin Hotel	190	S	
	Blue Moon Motel	38	S	
	By the Sea Motel	15	S	
	Heritage Guest House	2	Y	
	Merrills Cabins	4	S	
	Picket Fence Motel	20	S	
	Rossmount Inn	16	S	
	Seaside Beach Resort	21	S	
	Seaside Inn	12	S	
	Shiretown Inn	33	Y	
	Tara Manor & Motor Inn	19	S	370

A total of 109 units or 13.7% of the total for the county are located on Grand Manan Island. Although they would benefit from the drawing power of a marine park should it be established, they would not contribute substantially to accommodating visitors to the park because of access difficulties.

St. Andrews has a total of 370 units or 46.5% of the total for the county. The pre-eminance of St. Andrews in provision of accommodation in Charlotte County will serve well to position the community to reap maximum advantage should the park be created.

A critical part of the inventory and analysis process is the evaluation of the level of utilization of existing accommodation. This is a difficult process with many variables. Hotels, motels and other accommodation establishments licensed by Tourism New Brunswick are required to submit monthly accommodation reports to the Department. Not all do on a regular basis. Furthermore reports on individual establishments are strictly confidential and occupancy rates published are for Deer Island, Campobello Island and Grand Manan as one unit. Given the minimal affect of Grand Manan's accommodation supply on the supply in the park area the occupancy for the three Islands will reflect an unwanted bias.

For the period from 1979-1983, peak season occupancy (i.e. June-September) for the three islands varied from 47% to 59% while shoulder season (May, October) occupancy for the same area varied from 24% to 42%. It should be considered however that the occupancy rate on Deer Island may be lower than these averages because of specific attractions on Grand Manan and Campobello.

Occupancy figures in mainland Charlotte County are calculated for St. Andrews to Saint John (including St. Andrews) and St. Stephen to St. Andrews and are much the same as those for the Islands with peak season occupancy at approximately 60% (1983) and shoulder season occupancy at 35% (1983).[1]

The relevant implications of the above noted occupancy rates are:

1) Even during the peak visitor season there are approximately 40% of the area accommodation units available or 318 units. This, however, may be misleading as the most popular and larger establishments may not have rooms available and the rate may be influenced by poorer quality smaller units.
2) If the 60% is applied to accommodation on Deer Island this would imply that during peak season there is an average unused daily capacity of five units.

The quality of accommodation in Charlotte County varies greatly in terms of the physical quality of the rooms, the quality of management and the variety of services offered at each establishment. The largest establishment is the Algonquin Hotel in St. Andrews which is operated by Canadian Pacific. Prominent chains such as Fundy Line and Wandlyn are represented in St. Stephen as well as Best Western in St. Andrews. All other firms in the area are independant operations ranging in size from one to thirty-eight units.

[1]Source - New Brunswick Department of Tourism, Consolidated Occupancy Reports by Region, 1979-1983

One important consideration in the evaluation of existing accommodation is the ability of individual establishments to cater to bus tours or more specifically dive tours. Bus tours normally involve 25-35 people implying the need for 12-18 double rooms per establishment. Dive tours would likely involve 15-20 individuals at a time implying the need for 8-10 double rooms. In Charlotte County there are only seven establishment with greater than twenty-five rooms. If one considers the present 60% peak season average occupancy rate, the Algonquin Hotel is the only establishment capable of accommodating supplemental bus tours stimulated by the creation of a national marine park. In terms of dive tours that would require ten rooms or less a number of establishments have adequate capacity including three in St. Andrews (using 40% availability in peak season). It is important to note than none of the motels presently on Deer or Campobello Islands have adequate capacity to accommodate a dive tour, much less a bus tour.

Map 2 indicates travel distances and times from accommodation centers in St. Stephen, St. Andrews, Campobello, Deer Island and Grand Manan. As well, distances from air access point such as Saint John, Fredericton and Bangor are indicated.

MAP 2

DISTANCES FROM PROPOSED PARK AREA

2.2 Campgrounds

Table 2[1] Campgrounds

Location	Establishment	Units	Occupancy%[2]
St. Andrews	Island View Camping	75	
	Passemaquoddy Park	140	
St. George	Lake Utopia R. V. Park	25	
	Utopia Campsite	20	
Oak Bay	Oak Bay Provincial	111	47.8
Deer Island	Deer Island Point Park	75	
Campobello Island	Herring Cove Provincial Park	78	49.3
Grand Manan	The Anchorage Provincial Park	50	43.0
Pennfield	Clearwater Campground	85	
New River Beach	New River Beach Provincial Park	101	52.8
Lepreau	Cherry Tree Trailer Park	35	

Of the total of 795 campsites in the County, 340 sites are located in provincial parks for which accurate occupancy rates are kept. The occupancy figures indicated in Table 2 represent occupancy for July and August 1982 (65 day period). Occupancy figures are not accurately available for privately operated campgrounds.

The provincial park campgrounds offer facilities standard for all provincial park campgrounds including electrical hook-ups. The privately operated campgrounds offer a wider variety of services due to their commerical nature but vary in quality.

1. New Brunswick Travel Guide - 1984
2. New Brunswick Provincial Parks - 1982 Statistical Report

2.3 Attractions

For purposes of this inventory an attraction is defined as a facility or natural feature which by virtue of its existance draws visitation. In Charlotte County then are a number of existing attractions which are exploitated to various degrees.

Table 3 Attractions

Location	Attraction	Description
St. Andrews	Huntsman Marine Museum	Aquarium, marine displays
	Algonquin Golf Course	Golf Course
	St. Andrews Blockhouse NHS	National Historic Site
	St. Andrews Centennial Park	Small green area
	Minister's Island	Historical estate
	Atlantic Salmon Foundation	Salmon hatchery and rearing facility
	Algonquin Hotel	Historic Hotel & grounds
	St. Andrews Streetscape	Historic buildings,scenary
	Ross Memorial Museum	Museum
	Farmers and Fish Markets	
	Sailing	
St. George	Dam and fishway	Waterfall and fish ladder
	Old Mill	Grist mill

Table 3 Attractions

Location	Attraction	Description
Deer Island	Aquaculture establishment	Fish pens
	Indian Island	Historic buildings.
	Old Sow	Whirlpool
	Lobster Pounds	Lobster holding areas
Campobello Island	Roosevelt International Park	Historical sites
	Herring Cove Provincial Park	Golf Course, camping
	East Quoddy Head Lighthouse	
St. Stephen	Charlotte County Historical Society Museum	Museum
	Farmers Market	
	International Festival	local festival
Charlotte County	Saint Croix River	Heritage waterway
	McAdam Train Station	Historic railway station
	New River Beach Provincial Park	Sandy Beach

2.4 Restaurants

Table 4 Restaurants

Location	Number
St. Stephen	15
St. Andrews	10
St. George	1
Deer Island	1
Campobello Island	3
Grand Manan	5
Other Charlotte Co.	4
Total	39

The retail sale of prepared foods is not only carried out through the thirty-nine establishments indicated in Table 4. Throughout the area are also found a profusion of take-outs, lunch counter and food specialty shops which vary greatly in quality. The restaurants listed are those establishments with significant capacity.

3. MARKET

The establishment of a National Marine Park in the Fundy Isles area would be a major addition to the Province's product line, and would compliment our existing range of products and services. The accompanying private sector service development that the park's creation would encourage will enhance the ability of the Fundy Isles Destination Area to attract and hold visitors.

This preliminary market strategy reviews existing visitation in the Fundy Isles region and examines some possible target markets for the proposed national marine park. As the type and kind of facilities to be developed within the park are at this point defined only in a general sense no attempt has been made to delineate specific marketing tactics. None the less it is assumed that there will be sufficient opportunities for land based activities to ensure the success of this attraction. Moreover, these will be of a quality and quantity to compete effectively with other attractions on the Atlantic seaboard.

The Fundy Isles are located in Charlotte County in the southwest corner of New Brunswick. The Islands, in particular, and the County, generally, is a popular tourist region. The area contains a number of border crossings with the United States. Charlotte County has approximately 26,500 residents or 4% of the Province's population, while Washington County has 34,350 or 3% of Maine's population (1981 census).

The major industries of the area are fishing, tourism and forestry. The climate is moderate with early springs, long falls, late summers, and mild winters. Fog is prevalent during summer morning hours, adding to the atmosphere and "labelling" the area's seashore.

Charlotte County has the highest percentage of foreign land ownership registration in the Province (almost 10% of properties are held by non-residents). Most of these are held by residents of Maine, Massachusetts, and New York).

The County is a major entry and exit point for American and Ontario visitors to the Maritimes. The tourism industry is important to the area's economy. The area's popularity as a tourist region is based on its social heritage and relaxed lifestyle. The tranquil atmosphere which appeals to many visitors is a result of the area's scenic vistas, its fishing and loyalist settlements, and its geographical relationship with the sea.

The major strengths and weakness of the attractions indicated in Section 2.3, are relatively unchanged from a 1976 analysis. There is a need for commercialization of the area in a way that will promote visitor expenditures yet preserve the existing atmosphere.

MAJOR STRENGTHS

- There are many quality natural attractions such as seascapes and landscapes.
- Several historical attractions are of national significance.
- The cultural tradition of the Loyalists has been excellently preserved in the architecture of much of the region.
- The fishing industry, which is still largely based on traditional methods, is characterized by picturesque wharves, boats and villages.

MAJOR WEAKNESSES

- There is a lack of "things to do" at night.
- Attractions which would hold a visitor for more than an hour are lacking.
- There is a lack of attractions which promote visitor expenditures.
- Deer Island, St. Stephen, and St. George areas lack attractions (other than geographic or natural).
- The fish processing industry is being centralized within Black's Harbour and small island facilities are being abandoned.
- There is a lack of recreational day use opportunities.

(Source: Fundy Isles Region Tourism Industry
Development Plan, 1976)

3.1 Existing Visitation

New England visitors make up the largest percentage of tourists to Charlotte County. Of tourists who stayed overnight in the County, 51% were from New England and 21% from Ontario. Nova Scotia accounted for another 13%. Sightseeing was the purpose of visit, 59% of the time. Recreation was a goal only .8% of the time after visiting friends and relatives and "passing through". Not unexpectedly, St. Stephen/Milltown was the major entry/exit point. There is a large repeat market with 71% of parties surveyed visiting the Province previously(1)

The majority (86%) did not make accommodation reservations before hand, nor did they consult anyone for travel information (60%). Campgrounds were used the most (27%) as accommodation, followed by staying with friends and relatives (21%). The majority of parties spent one night in the County, and spent most of their money on accommodations followed by restaurants. Total number of parties who stayed overnight in the County in 1981 was 38,932(2)

Washington County is not a popular destination area for Maine tourists and lacks major recreational areas. The percentage of tourist days spent in Washington County by residents and non-residents was only 2.6% of total tourist days spent in Maine. Seventy-two percent (72%) of tourists entering Maine did so at Kittery (I95) and most were from Masssachusetts (30%) New Hampshire and New York. Most visitors to Maine tended to spend their vacations in more southerly counties. Only 5% of total non-resident traffic entered Maine from New Brunswick(3)

1. 1980 Auto Exit Survey, Tourism New Brunswick
2. Ibid
3. Tourism in Maine: Analysis & Recommendations, May 1974

Statistics Canada traffic counts show St. Stephen/Milltown as the major border crossing in the area, with 896,643 vehicles passing through in 1982. Thirty-four percent (34%) of these were Americans entering Canada, while 66% were returning Canadians.

In summary, a comparison of border crossings and tourist visitation in Maine and New Brunswick shows greater Canadian tourist flows to the United States; however they are only a small portion of total visitors to Maine. Conversely, the major portion of visitors to Charlotte County were Americans.

The total number of Canadian and U.S. vehicles (other than commercial trucks) passing between the U.S. and Canada in 1982 by entry points:

Table 5 Customs Count - Vehicles - St. Stephen - Milltown[1]

St. Stephen - Milltown (Calais)

January	56,181
February	55,613
March	64,846
April	82,899
May	76,751
June	78,841
July	98,711
August	98,200
September	79,330
October	73.839
November	63,442
December	67,990

Total for 1982 - 896,643 vehicles

-308,331 (34%) of these vehicles were from the U.S. entering Canada at St. Stephen - Milltown.

-588,312 (66%) of these vehicles were Canadian vehicles re entering Canada at St. Stephen - Milltown.

1. Travel between Canada and Other Countries
   Statistics Canada, 1982

Table 6 - Customs Count - Vehicles Campobello[1]

January	9,304
February	9,125
March	11,838
April	12,834
May	15,259
June	17,639
July	27,163
August	26,690
September	19,038
October	15,938
November	12,429
December	12,487

Total for 1982 - 189,744 vehicles

-57,509 (30%) of these vehicles were from the U.S. entering Canada at Campobello.
-132,235 (70%) of these vehicles were from Canada re-entering Canada at Campobello.

[1]Travel Between Canada and Other Countries.
Statistics Canada 1982).

3.2 Market Segments

A significant market segment for a National Marine Park involve water based recreational pursuits such as scuba diving, snorkelling, and shore based activities. It is estimated that there are 200,000 certified scuba divers in Canada, 10,000 of which reside in nearby Nova Scotia.(1). There are approximately 12,000 new divers certified each year in Eastern Canada and another 29,000 certified each year in New England. Even with a 50% participation rate, this market is increasing by 20,000 divers each year(2). Scuba diving lends itself to group packages due to the dangers involved in the sport. "Six-Pack" tours are generally offered by charter boat operators at other resort areas(3). The expense of the sport is such that it attracts participants from higher income groups who have discretionary income for travel. Thus, the proposed National Marine Park would have to be competitive with resorts offering dive facilities as far south as the Carribean.

While the Bay of Fundy may be considered too cold for some to swim in, swimmers are a market segment which should be investigated. A 1976 survey found that 41% of all Canadians 14 years of age and over participated in swimming at least once the previous year.

1. Activity Profiles from Three Water Based Recreational Activities, Parks Canada, 1981, p.8.
2. Ibid, p. 36
3. Ibid, p. 38

As a recreational activity, swimming was chosen most popular by Canadians(1). Ontario has the highest participation rate at 45% while New Brunswick was ninth with 29% participation(2). Water temperature is a controlling factor in the decision to swim. While some swimmers prefer very cold waters for a refreshing dip, heated pools will be required in the park area to attract the majority of park users.

The popularity of shore uses such as clam digging, picnicking, beachcombing, wading, sunbathing and sightseeing are all selling points of a National Marine Park with land based activity centers. National participation rates in these activities are in the order of 60-80%(3). A Pacific Rim National Park Study found that 50% of all visitors listed ocean setting and scenic value as prime motivators in visiting the seashore(4). The proposed National Marine Park area offers aesthetic appeal and makes it easy to sell to those users enjoying a sense of space, solitude, freedom, and the changing sea.

In addition to shore based activities, the park or its adjacent area must offer land based activities such as hiking, camping, bicycling, golf, shopping, lobster/clam bakes, etc. Some of these are available now in the area. However, ease of access and transportation links in and around the park area must be upgraded to allow increased capture rates for this product area.

1. Activity Profiles for Three Water Based Recreational Activities, Parks Canada, 1981, p. 36
2. Ibid, p. 38
3. Ibid, p. 62
4. Ibid, p.66

3.3 Market Size

The socio-economic impact study for the park, estimates existing visitation to be approximately 20,000 visitors. The potential market size for the park is estimated in the order of 20,000 additional visitors in the first year of operation.

The number of users forecasted is low when compared to nearby competition. Fundy National Park visitation is in the order of 200,000 persons. Visitation at Acadia National Park is also higher with 3.1 million visitors or approximately 960,000 parties visiting May through September. New York and Massachusetts provide the greatest percentage of U. S. visitors to Acadia, while Ontario is their largest Canadian market.

Table 7 FUNDY NATIONAL PARK 1983 VEHICLE PARTIES[1]

January	6,364
February	6,085
March	7,559
April	8,279
May	17,446
June	31,143
July	67,868
August	57,175
September	30,473
October	13,546
November	9,209
December	7,728
	262,875

1. Pers com, Fundy Park staff

Table 9 ACADIA NATIONAL PARK VISITORS[1]

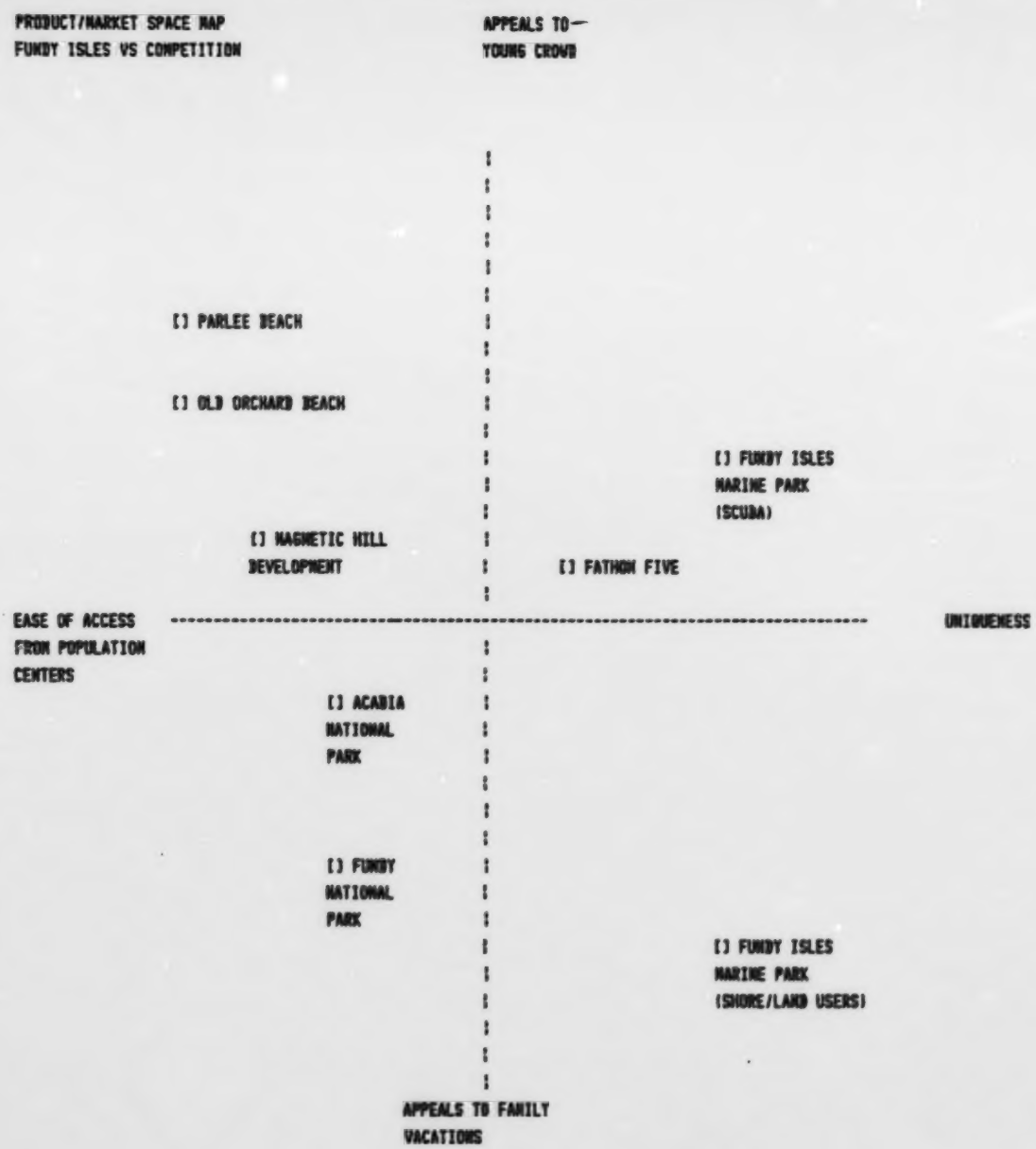
	1983	1982
May	303,713	276,704
June	450,394	420,167
July	931,726	753,804
August	730,876	589,416
September	684,233	556,373

1. Pers Com, Acadia Park Staff.

A West Isles National Marine Park would be a unique addition to the Province's product line. When fully developed it should be competitive with similar products on the eastern seaboard. It is well-positioned in a market space not currently occupied by existing park products (with the possible exception of the Carribean). A major barrier to becoming a success is the current access constraints and distance from population centers.

Competitive marketing strategies designed to entice the American and Canadian visitor farther up the coast to the Campobello entrance would fragment the Acadia Park market and contribute to the National Marine Park's use. Some fragmentation of the Fundy National Park market can also be expected. Products such as Parlee Beach, Old Orchard and Magnetic Hill are not considered to be direct competition for the same tourist dollar but are complementary. As the area becomes better known, Ontario's Fathom Five Provincial Park and other dive resorts world wide can be expected to provide competition for the scuba diver. Acadia National Park can also be expected to attempt to reconsolidate their market through some sort of innovation or new development.

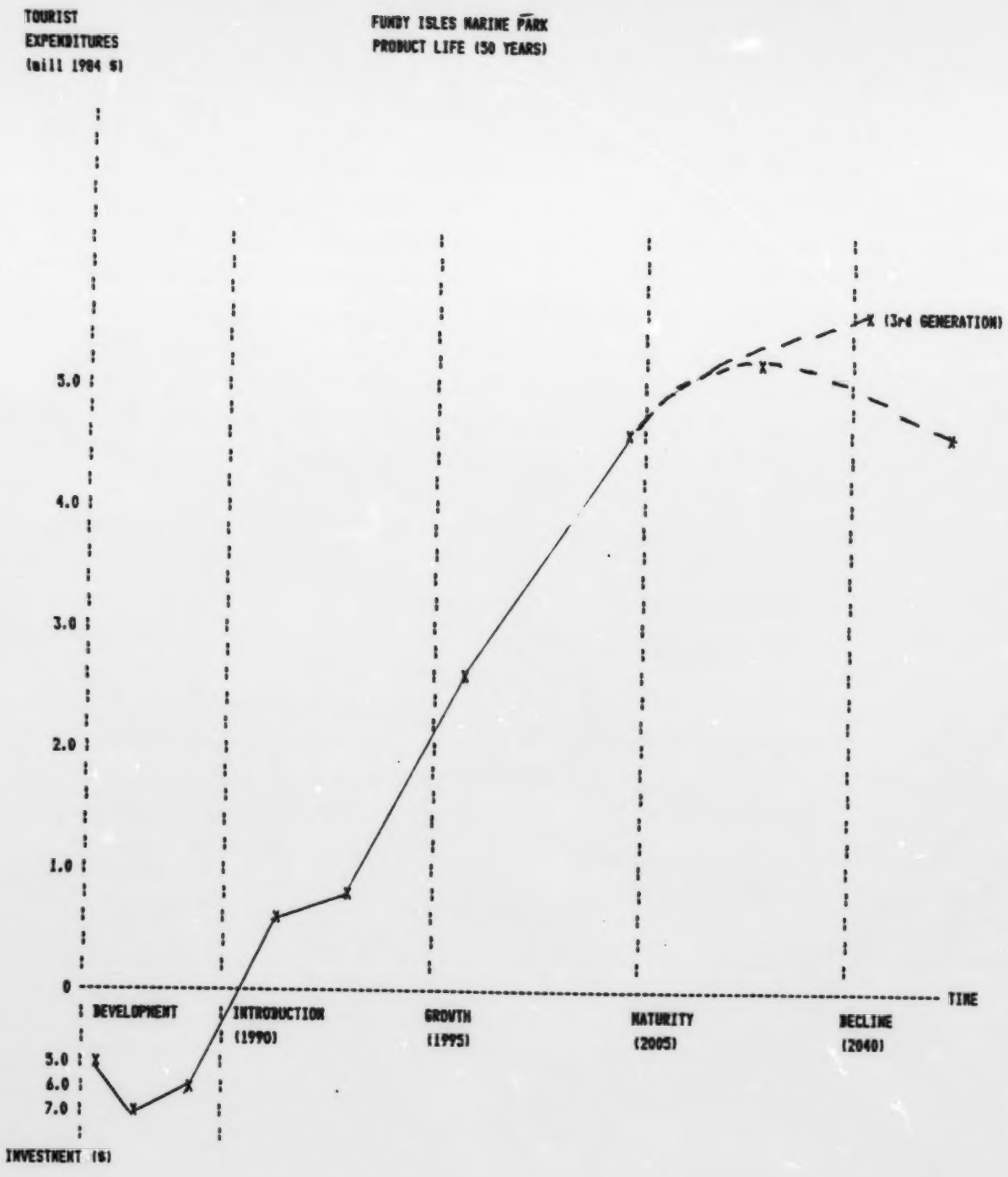
Map 3


PRODUCT/MARKET SPACE MAP
FUNDY ISLES VS COMPETITION
APPEALS TO—
YOUNG CROWD
[] PARLEE BEACH
[] OLD ORCHARD BEACH
[] FUNDY ISLES
MARINE PARK
(SCUBA)
[] MAGNETIC HILL
DEVELOPMENT
[] FATHOM FIVE
EASE OF ACCESS
FROM POPULATION
CENTERS
UNIQUENESS
[] ACADIA
NATIONAL
PARK
[] FUNDY
NATIONAL
PARK
[] FUNDY ISLES
MARINE PARK
(SHORE/LAND USERS)
APPEALS TO FAMILY
VACATIONS

3.4 Market Mix

The mix of marketing activities planned for the park should follow its life cycle. It is estimated that the park would have a 50 year "life" before a "3rd generation" of growth in facilities, or new users is required to maintain its saleability. Assuming that planned development occurs over the next five years, the Park would be in full operation in 1990. However, even at this stage the transportation links and park facilities would be of a" basic" nature. Its main competition would be Fundy and Acadia National Parks and its target markets should be innovative/high income tourists that take activity vacations (ie: scuba divers). Packages developed for scuba diving, sailing/boating, fishing or marine life tours should be priced high to recover costs.

Increasing dependence on shore/land use markets should occur around 1995 when, the Park enters its growth stage of market development. From 1995 through 2005 the Park should be promoted as a superior, sophisticated product with wide appeal to all market segments. Package prices should drop to penetrate the mass market and encourage repeat use. An analysis of Fathom Five 1983 diver registrations shows 55% were repeat visitors to that Park. Promotional/advertising campaigns should stress uniqueness, price, quality of experience and evolve from a wide coverage strategy to one of specialized target markets. Product distribution should be widespread. Ease of access to the park itself and to its packages should be superior to encourage sales.


TOURIST
EXPENDITURES
(mill 1984 $)
FUNDY ISLES MARINE PARK
PRODUCT LIFE (50 YEARS)
X (3rd GENERATION)
5.0
4.0
3.0
2.0
1.0
0
TIME
DEVELOPMENT
INTRODUCTION
(1990)
GROWTH
(1995)
MATURITY
(2005)
DECLINE
(2040)
5.0
6.0
7.0
INVESTMENT ($)

A levelling in demand will occur around 2005 as peak visitation for the existing product configuration is reached. During this maturity period, repeat use and word of mouth endorsements will sustain demand.

A third generation of facility development or new target markets will be required by 2040. A natural decline in visitation can be expected and either new users or new uses for the area will be required to maintain market share. At that time, however, it may be best to manage a leveling off to lessen environmental impacts or allow a regeneration of natural habitat. If so, strategies to attract the special interest market, with high priced packages and specialized promotions would be recommended to maximize return on investment.

3.5 Conclusion

A marine park as an environmental preserve will last for generations. Astute marketing and operational management will extend the saleability of this product.

To be sold as a tourist destination it must be commercialized to some extent. While an overall strategy of growth is directed at capturing special interest markets, and fragmenting competitor's markets, specific marketing programs for individual product parts are required once the facilities are put in place.

Table 9
West Isles Marine Park
MARKETING MIX

LIFE CYCLE	INTRODUCTION	GROWTH	MATURITY	DECLINE
MARKET SEGMENT	INNOVATIVE/ HIGH INCOME	HIGH INCOME/ MASS MARKET	MASS MARKET	SPECIAL INTEREST
COMPETITORS	FEW	MANY	MANY	FEW
PRODUCT				
CONFIGURATION	BASIC	2nd GENERATION	SOPISTICATED	3rd GENERATION
QUALITY	FAIR	GOOD	SUPERIOR	SPOTTY
CAPACITY	UNDER	OVER	OPTIMAL	UNDER
PRICE				
PREMIUM	HIGH			HIGH
PENETRATION		MEDIUM		
SKIMMING			LOW	
PROMOTION				
ADVERTISING	AWARENESS	UNIQUENESS	PRICE/EXPERIENCE	SPECIALIZED
PUBLICITY	SOME	WIDE COVERAGE	SPECIALIZED	SPARSE
SALES INCENTIVES	FEW	MANY	SOME	NONE
CHANNELS				
WHOLESALE	FEW	MANY	MANY	FEW
RETAIL	NONE	FEW	MANY	FEW
TERRITORY	SMALL	WIDE	WIDE	AVAILABILITY
ACCESS	FAIR	GOOD	SUPERIOR	GOOD

In summary the following points are relevent to the market:

- A National Marine Park would compliment the Province's existing product line.

- Opportunities for land based activities are required for the park's success.

- Existing tourist flows show a low U. S. visitation rate, yet Americans make up the largest segment of Charlotte Co. tourists.

- Major market segments proposed for the new park are water based (scuba, swimming, boating, shore users) and land based (hiking, bicycling, camping, golf).

- Additional growth can be achieved through fragmentation of competitor's markets, and pricing policies to pentrate and increase market share.

- Specific marketing policies will be required for each of the park's attributes when facilities are known or in place.

- The initial product life is planned to be 50 years.

4. DEVELOPMENT CONCEPT

The development concept is based upon the establishment of a national marine park in the West Isles. Although there is a strong base of attractions in the Fundy Isles, the park would be the drawing card with national and international profile necessary to attract tourists to the area. The capital development of the park would form the basis for extensive peripheral development of attractions and services.

Should the decision be made not to proceed with the development of the national marine park some exploitation of the resource could still continue but the lack of marine park type facilities in the West Isles would mean that most of the benefits would be centered on the mainland (i.e. St. Andrews) or the developments on Campobello. That is to say, dive tours and boat tours could still be arranged to the area but there would be few controls on them and they would likely originate in St. Andrews where there are adequate accommodations.

4.1 THEME - MAN AND THE SEA

The overall theme for tourism industry development in the area should be man and the sea. The most marketable and apparent resource is the seashore and the islands. This thematic approach is consistent with the theme of the proposed national marine park.

In practical terms this implies orienting development towards the marine environment and maximizing contact with the sea by tourists including:

1) Access via tour boats for surface viewers as well as divers.
2) Sale of fish and other marine products directly to tourists.
3) Use of marine themes in the architecture of tourist facilities.
4) Use of marine themes in promotion and marketing.
5) Explotation of the historic relationship in the area between man and the sea.
6) Orientation of marketing efforts towards market areas interested in seashore experience.

The use of this theme is also consistent with the existence of the area's primary industry, the commercial fishery, and will allow development to be complimentary to the continuing good health of the fishing industry. The participation of the Province of New Brunswick in the national marine park project is on the basis that there be no disruption of the commercial fishery and that is also a premise of this tourism development plan.

4.2 Private Sector Involvement

Private sector involvement is central to the development concept. The greatest net economic benefit to the residents of the region will come from private sector investment. Although the construction of a national marine park would involve economic activity during construction and would provide the area with a certain number of permanent and seasonal jobs the greatest effect would be in the economic activity caused by the provision of services such as hotels, motels, food services, boat charters and such activities and developments of various attractions.

It is very important that private sector involvement be stimulated in such a way as to allow local residents to participate. Development of the park itself would be over a ten year period. It is important that a similar time frame be followed in peripheral facility development in order to allow local residents to participate. It will be necessary to provide stimulation capital, training opportunities and professional planning assistance to facilitate that participation.

4.3 Target Market

The target market for this tourism development plan involves two separate groups of people best described as those above water and those below water. Their needs are similar in some areas but quite distinct in others.

The proposed national marine park itself would cater to this distinction in that it could provide services and facilities to divers such as a dive centre, underwater trails, a decompression facility and supervision while at the same time providing recreation and interpretation opportunities to non-divers, who because of their inability to descend below the surface, would must have access to a significant portion of the park. This will be done by effective use of interpretive media, aquariums and surface tours.

There are commercial opportunities with both segments of the target market that are best provided by the private sector. Many of these opportunities make use of existing resources and skills. A good example of this could be the use of fishing boats for touring purposes and dive charters.

4.4 The National Marine Park In Charlotte County

It is important that tourism development in relation to the national marine park be integrated into tourism activity in Charlotte County as a whole. Developments proposed for Campobello Island as well as existing developments such as the Roosevelt Park and Herring Cove Provincial Park would play an important role. Similarly developments in St. Andrews and St. George must be considered in relation to the proposed park.

5. DEVELOPMENT STRATEGY

There are various motivating factors behind this development strategy. The strategy is primarily oriented towards recommending those developments necessary to provide services to visitors to the national marine park should it be constructed. In addition, it also recommends the development of several attractions which would "piggy-back" upon the attracting power of the proposed park and keep visitors in the area a little longer. Although the park would be a powerful centerpiece and attracting force, peripheral developments are necessary if they are to be retained more than the minimum amount of time and if maximum commercial advantage is to be taken.

Secondly, the strategy is oriented towards maximum financial benefits for local residents. Herein lies a major problem. One of the principal concerns of local residents is the effect of increased tourist traffic on their current lifestyles. If Deer Islanders, for example, are to achieve maximum financial benefits for their Island it would be to their advantage to have as many park and visitor servicing facilities as are feasible on the Island. However, this would cause maximum disruption of their way of life. This trade-off will doubtlessly be a major factor in the assessing of the feasibility of establishing a National Marine Park. Deer and Campobello Islands border on the study area and are physically in a good position, access problems notwithstanding to take advantage of the increased tourist traffic. Deer Island and, to a lesser extent Campobello, are dependent upon the commercial fishery for their primary sources of income and employment. The creation of a National Marine Park would provide a source of alternate and supplemental income and the best way to generate this income is through private sector development adjacent to the National Marine Park.

Developments must also fit into the global strategy for Charlotte County. Concurrent with the national marine park project, other development opportunities are being investigated in the County. All of these developments will contribute to the attractiveness of the County to tourists and services and small attractions should be developed so as to contribute to the overall development.

5.1 National Marine Park Development Options

Most of Section 5.1 is extracted directly from documents entitled "West Isles Feasibility Study - Visitor Use Concepts - Technical Summary". Although this plan deals almost exclusively with potential developments outside proposed park boundaries, the development option chosen would have implications for outside development.

Basic to the visitor use concept of the proposed national marine park in southern New Brunswick is the overall objective of providing as much of the population as possible with opportunities to appreciate, understand, and enjoy the marine environment of this natural area of Canadian significance in ways that are compatible with the protection of dynamic natural resources.

The bulk of the visitors' experience would be associated with the intertidal zone and boat tours on the water surface. Obviously, however, most visitors would not come in direct contact with the underwater portion of the proposed national marine park. Therefore, a broad range of facilities and equipment, including a large variety of advanced interpretive media, would be required in order to extend the visitors' experience into the marine world.

Thirdly, the water base component of the proposed national marine park is complimented by a relatively small land base which serves as the place of orientation from which all visitor activities originate.

5.1.1 Visitor Use Compatibility

Visitors uses in the proposed national marine park that are compatible with the draft Parks Canada Policy and Objectives include the following:

- beachcombing
- picnicking
- saltwater sport fishing
- sailing and motorboating
- boat tours (organized)
- scuba diving and snorkeling
- hiking and guided interpretive walks
- camping
- photography, painting, sketching, etc.
- seascape viewing and wildlife observation
- discovering the various interpretive messages and themes
- sightseeing and viewing of historic, cultural and architectural sites.

In presenting these activities to visitors, the goal of Parks Canada is to provide a total recreational and educational experience that allows, along with relaxation, a deep appreciation and understanding of the marine resources and cultural riches of the proposed park and region.

5.1.2 Three Park Development Options

As part of the total planning exercise leading to an evaluation of the feasibility of establishing a national park in the West Isles, Parks Canada has created three development options identified as Options I, II and III. These options portray a national marine park in a rural setting where there is initially a low level of community infrastructure. The proposed national marine park would be predominantly based on the aquatic environment with boat tours, scuba diving, shipwrecks, local history and folklore as integral and exciting parts of the total visitor experience. The proposed park would provide a setting for these activities and would set a quality standard for the development of facilities in the area, maintaining the unique and appealing rural marine character of the West Isles and Campobello Island.

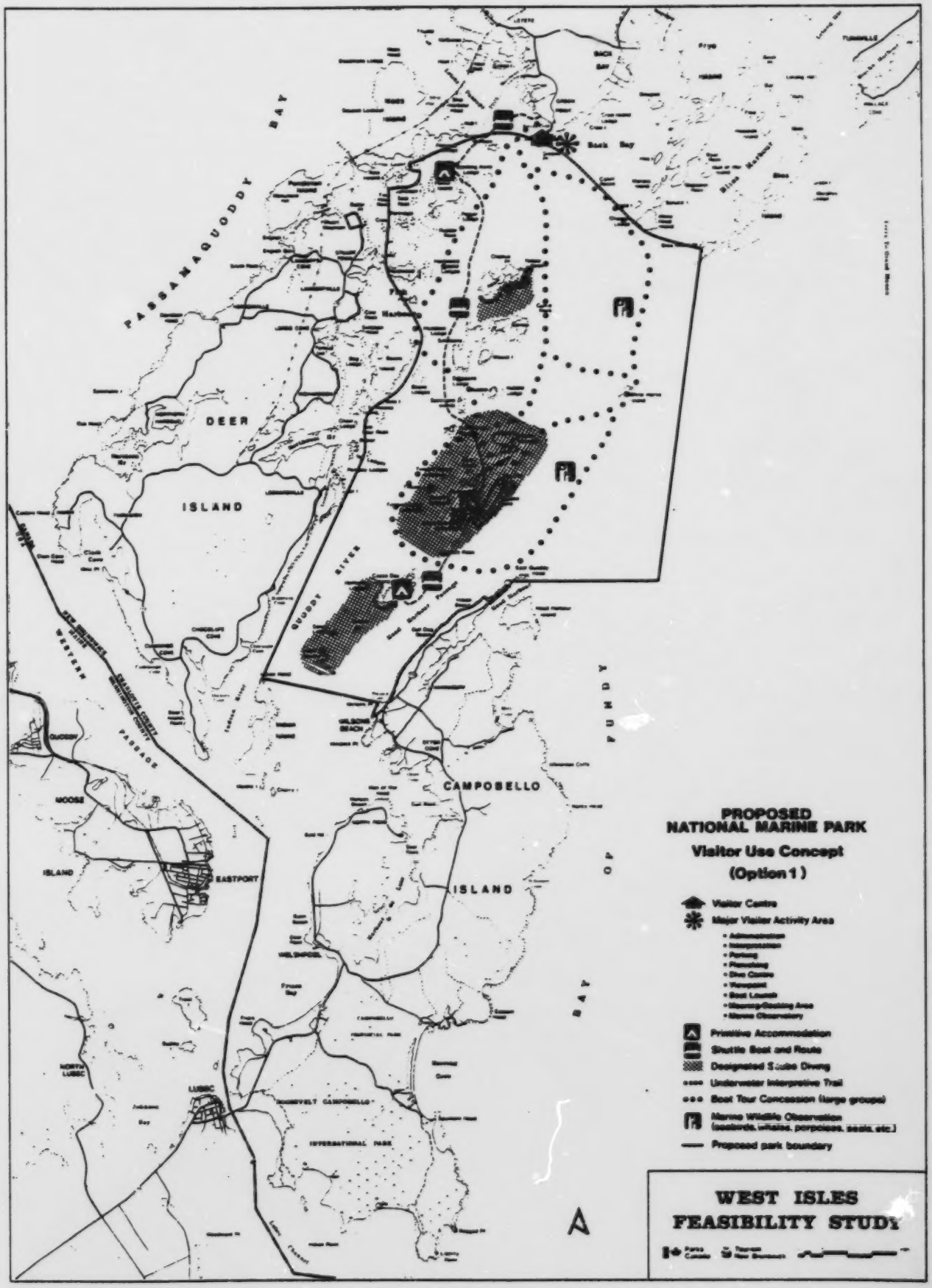
Option I is best described as a centralized option with one major visitor reception centre located in the Green Point area. Option III is variation of this theme, involving the location of the visitor reception centre in St. Andrews. Essential services and facilities to appreciate, enjoy and understand the coastal and marine resources of the area are illustrated on Map 4 (Option I). Map 6 illustrates Option III. Activities might include beachcombing, guided scuba tours, boat tours, offering underwater viewing opportunities, sailing and salt water fishing excursions. Primitive accommodation on some of the smaller islands would provide a marine-related camping experience. A wide range of relatively low-key recreational opportunities and their related facilities would be provided including a visitor centre as the most appropriate facility to orient and guide the visitor to

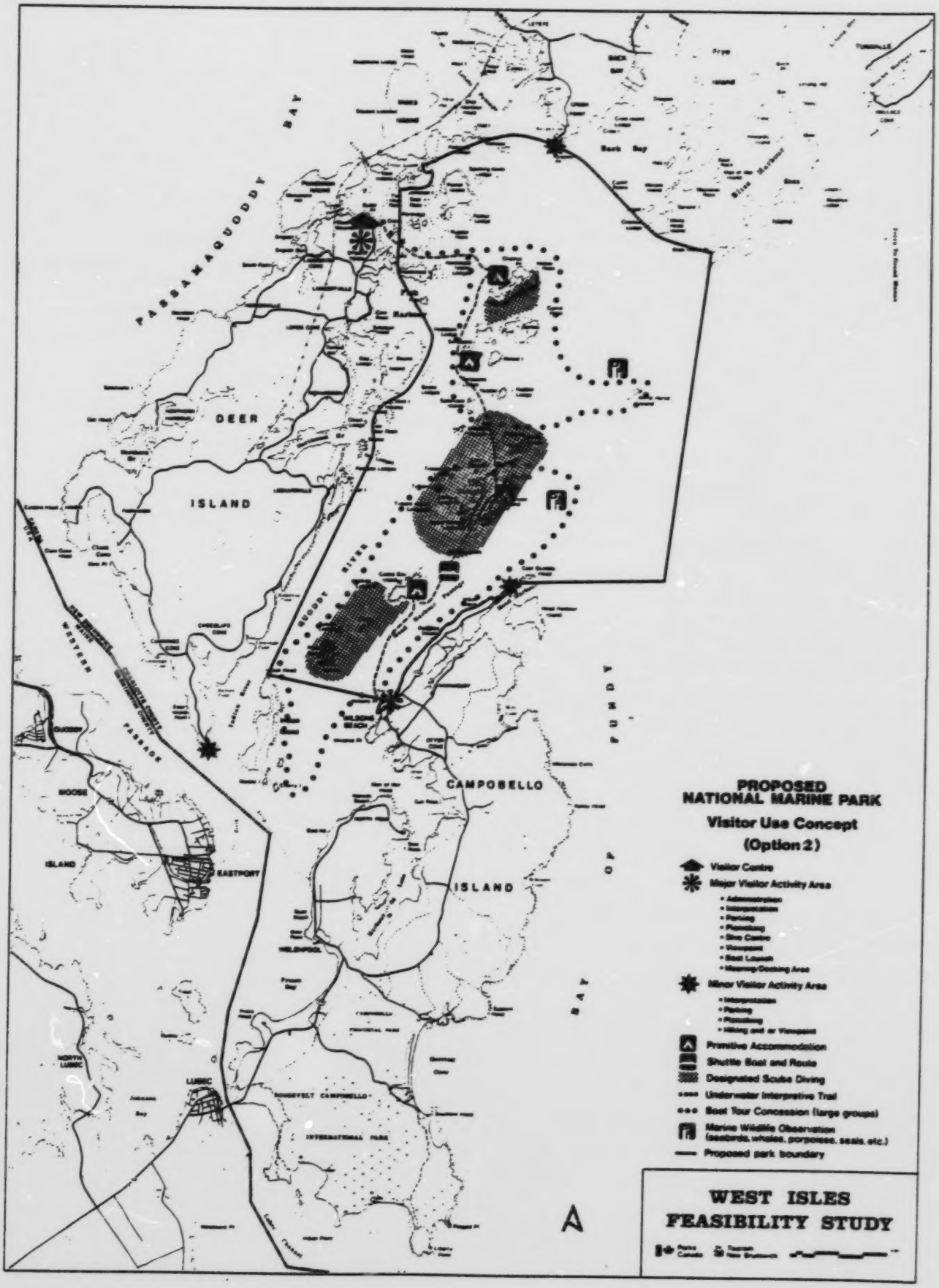
the kind of experience that would be available in the proposed national marine park during all seasons. In addition to the more traditional media devices, such as films and interpretive exhibits, important marine resource management principles could be illustrated in the visitor centre through the use of simulation models and electronic equipment. A marine observatory, providing visitors with direct access to the underwater environment, would highlight the experience of local and out-of-province visitors.

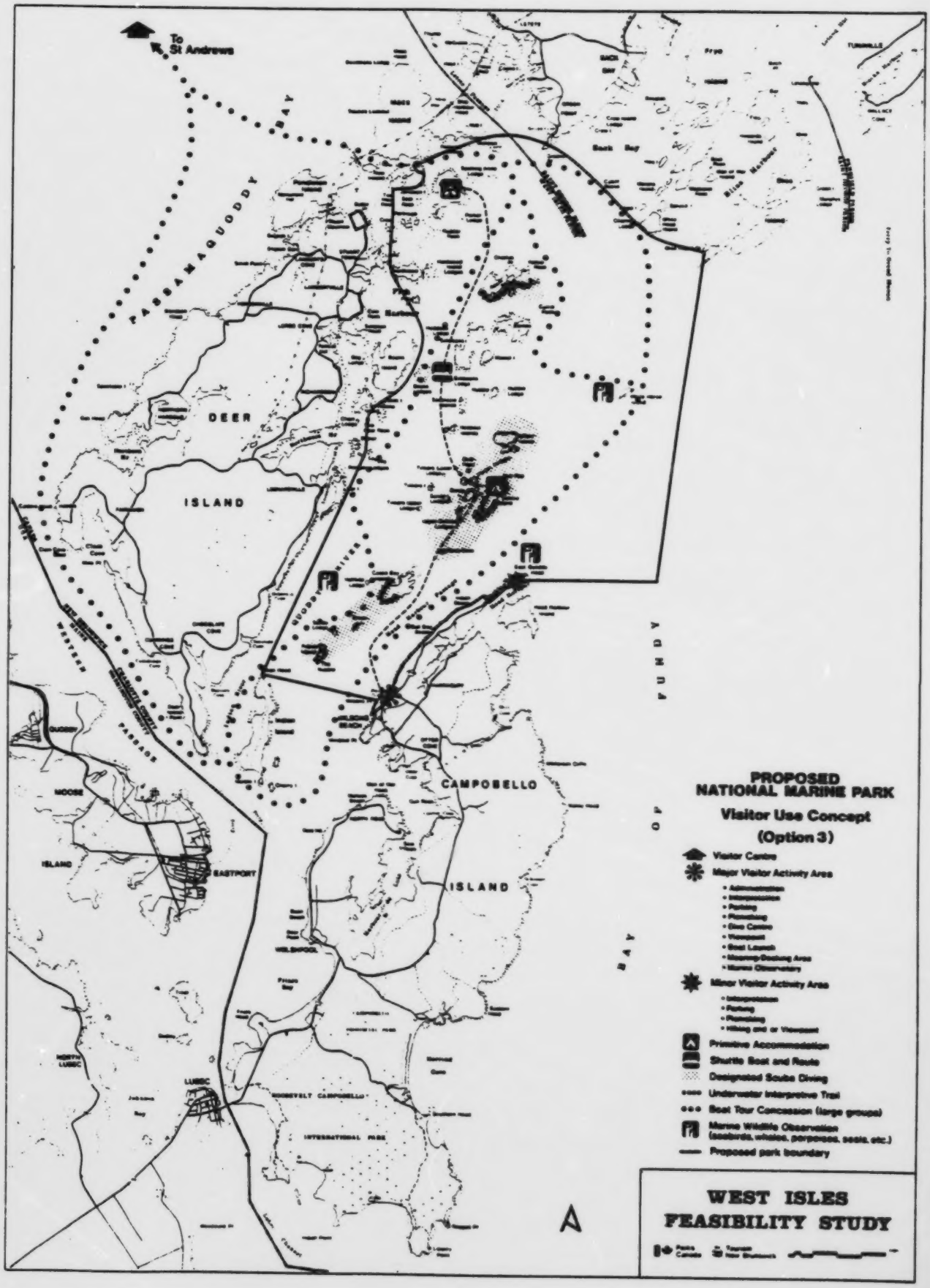
Implicit in the layout of Options I and III is the understanding that there would be no park facilities on Deer or Campobello Islands. Significantly fewer visitors would travel to the Islands, thus minimizing the negative effects of the establishment of the park on the daily lives of Islanders. Also implicit in this option is the fact that if more tourists do not visit these Islands there will be fewer commercial and employment opportunities.

Option II is a decentralized option with visitor reception facilities located on Deer and Campobello Islands, park administration facilities on Deer Island and minor visitor facilities at Green Point and at East Quoddy Head on Campobello Island (see Map 5 - Option II). Activities might include guided scuba and snorkeling tours, whale-watching tours, viewpoints for observing marine wildlife, organized boat excursions for large tour groups, and visiting one of two smaller visitor centres, (as compared to Option I), where marine themes are illustrated by appropriate media devices. Displays, brochures, cross-section illustrations, films, and slide shows are possible means of presenting interpretive messages to visitors. Special interpretive boat tours for small groups would also be provided.

Option II would involve increased visitation by park visitors to Deer and Campobello Islands and would obviously imply a requirement for improved ferry access to Deer Island. It would also offer greater employment and income opportunities to these two Islands.


PASSAMAQUODDY BAY
DEER ISLAND
QUODDY RIVER
FUNDY
CAMPOBELLO ISLAND
EASTPORT
MOOSE ISLAND
LUBEC
PROPOSED
NATIONAL MARINE PARK
Visitor Use Concept
(Option 1)
Visitor Centre
Major Visitor Activity Area
Primitive Accommodation
Shuttle Boat and Route
Designated Scuba Diving
Underwater Interpretive Trail
Boat Tour Concession (large groups)
Proposed park boundary
WEST ISLES
FEASIBILITY STUDY


PASSAMAQUODDY BAY
DEER ISLAND
CAMPOBELLO ISLAND
FUNDY
BAY OF
EASTPORT
LUBEC
PROPOSED
NATIONAL MARINE PARK
Visitor Use Concept
(Option 2)
Visitor Centre
Major Visitor Activity Area
Minor Visitor Activity Area
Primitive Accommodation
Shuttle Boat and Route
Designated Scuba Diving
Underwater Interpretive Trail
Boat Tour Concession (large groups)
Marine Wildlife Observation (seabirds, whales, porpoises, seals, etc.)
Proposed park boundary
WEST ISLES
FEASIBILITY STUDY


To St Andrews
PASSAMAQUODDY BAY
DEER ISLAND
CAMPOBELLO ISLAND
BAY OF FUNDY
EASTPORT
LUBEC
MOOSE ISLAND
PROPOSED NATIONAL MARINE PARK
Visitor Use Concept
(Option 3)
Visitor Centre
Major Visitor Activity Area
Minor Visitor Activity Area
Primitive Accommodation
Shuttle Boat and Route
Designated Scuba Diving
Underwater Interpretive Trail
Boat Tour Concession (large groups)
Marine Wildlife Observation (seabirds, whales, porpoises, seals, etc.)
Proposed park boundary
WEST ISLES
FEASIBILITY STUDY

6. ATTRACTIONS

It would perhaps be appropriate to define what constitutes a tourist attraction particularly in view of the publically voiced skepticism by some residents of the West Isles as to what would attract tourists. A tourist attraction is best described as any feature of an area which will draw tourists to an area, retain them in the area once they have arrived and will entertain, interest or stimulate them while they are there. In the large sense, particularly in the context of this plan, the proposed national marine park would be a major tourist attraction of national stature which would draw tourists to the area. In the smaller sense, a boat tour would be an attraction which would entertain tourists and retain them in the area, although it would not necessarily draw people on its own.

It should also be considered that what is an attraction to some people would not even remotely interest others. A foggy coastline with blaring foghorns may be a dangerous nuisance to a West Isles fisherman but to a visitor who has never experienced the sea it is mysterious and romantic. To a fisherman, handlining is simply a hard way to make a living; to a resident of Ontario or the American mid-west it is an unforgetable adventure.

The general philisophy behind this tourism development plan is to provide a broad spectrum of attractions and services that will complement the development of the national marine park options. This means catering to all age groups, to singles and travelling families and to individuals and parties with varying interests and financial resources. Included in the philosophy is increasing the length of stay, supplementing the options presented by Parks Canada and facilitating better access to the main attractions -the national marine park. Accent in this plan is on the marine environment and all marketing and promotion efforts should be towards this end.

A national marine park would be of prime interest to the diving community but it is essential that there be sufficient facilities to attract non-divers who make up the bulk of the population. It is important to provide alternatives for entertaining tourists in the area given the weather conditions present in the West Isles Also relevant is the provision of both daytime and nighttime activities.

The three options prepared by Parks Canada have some very definite implications for the location and development of attractions and services. Option I involves the location of the visitor reception centre in the Green Point area with no facilities on Deer or Campobello Islands. An obvious implication of this option is that a greater accent on attractions on the mainland would be appropriate with minor development on the Islands because the park visitors would not be there. The implications for Option III are similar. On the other hand, Option II involves a minor facility at Green Point and larger visitor reception facilities on Deer and Campobello Islands. Thus there would be a greater need for attractions and services on the Islands with this option.

Many of the attractions mentionned in this chapter already exist in one form or another. The intention of this planning process is to highlight these attractions and suggest how they could best be developed to improve tourist access and provide revenue opportunities. Projected costs associated with the attractions are estimates in 1984 dollars and each facility should be the subject of a detailed concept development and feasibility study prior to actual implementation. The general thrust in terms of costs is that the accent be on private sector opportunities and revenue generation with modest capital cost. Implementation scheduling is in relation to the phasing of national marine park development.

Given that a national marine park would be of importance to the diving community, it is important to note that most of the dive sites in the proposed park area are boat access only and present intermediate and advanced level diving opportunities. There is a distinct lack of shore access sites and beginner level sites. This is not surprising considering that most of the shoreline is privately owned. Consistant with the philosophy of providng a broad spectrum of opportunities, this plan will suggest development of several sites as shore access/novice sites to complement the national marine park opportunities.

6.1 Natural Resource Based Attractions

For the most part natural resource based attractions are not direct revenue generators unless they involve an associated service function or the resource is so majestic or unique that admission can be charged. These attractions are important, however, in that they facilitate access to area resources, attract visitors to the area and retain visitors for a longer period of time. The location of natural resource attractions is site specific; the degree of development relates to the national marine park development option chosen.

6.1.1 Oven Head

Oven Head is a peninsula of approximately 18 acres in area located on Passamaquoddy Bay approximately thirteen kilometres (direct distance) from Green Point. Access to Oven Head is via good quality gravel road from Highway #1 between St. Andrews and St. George and the road gives access directly onto the Head. The property has no structures on it, is presently unused and is partially owned by Tourism New Brunswick. Any development would have to be preceeded, of course, by negotiations for acquisition of the remaining property from the current owner. It has excellent view planes directly across Passamaquoddy Bay to the study area. The property contains an extensive cobble beach as well as a treed area and an interesting height of land.

From a marine perspective the Peninsula encompasses a well sheltered and quite shallow cove. The waters on the Bay side of the peninsula are open to the Bay and are relatively shallow within swimming distance. Bottom characteristics for the sheltered area are mud with some cobble. On the Bay side of the Peninsula the bottom changes from mud to cobble, boulder and ledge. In both cases depth changes are gradual.

Recommendation: 1. Develop a day use marine park at Oven Head to encompass the peninsula and adjacent waters.

2. The Province should obtain an option to purchase the remaining property on the Head.

If Option I or Option III is the chosen option for the park development option, it would be quite important to develope Oven Head as a day use park facility that will offer picnic facilities, sightseeing, and hiking opportunities, and shore access, beginner level diving opportunities. If Option II is pursued for national marine park development, more of the park visitors will be concentrated on Deer and Campobello Islands and thus there would be less need to develop Oven Head. However the day use facilities that could be presented would still be of value.

There are choices for development of this park site. It could be developed as a provincial marine park which would be consistant with the provincial park classification system and a maintained as a provincial day use park. It could also be developed as a private sector development although this would necessarily involve charging admission and possibly camping (minor) and a canteen of some sort. Whether the park were developed by the provincial government or the private sector the costs associated would be much the same for facilities of similar quality.

Development of the Head as a day use park should include the following facilities:

1. Access road improvements and installation of a control gate
2. Site landscaping and cleanup
3. Service plaza to include a comfort station, pottable water, cold water showers, parking
4. Picnic facilities including several picnic shelters, tables, charcoal disposal, garbage containers.
5. Fencing near cliff faces
6. Interpretive facilities (displays, look-offs etc.)
7. Underwater cleanup (removal of old weir poles and ropes.
8. Installation of prepared old boats in the water to create shallow water wreck diving opportunities.

An estimate of cost of this facility would be approximately $750,000.

Costs associated with creating a park at Oven Head which would involve camping and food services would vary greatly depending on the standards to which the facility was built.

A detailed feasibility study would be required before private sector involvement in development.

6.1.2. Old Sow Look-off

Old Sow is reputed to be the second largest whirlpool in the world. It is located directly south of Deer Island Point and can be viewed from the elevated portion of the D.I.D.A. Campground/picnic area.

This attraction already draws a number of curious tourists but it is not intepreted or well-promoted. For the most part, it is difficult to distinguish the whirlpool from the water around it and the tremendous forces are only obvious when a boat passes through it and shows obvious accelleration.

If Option I or Option III is pursued there would be minimal need to construct an interpretive facility in relation to Old Sow as there would not be the increase in visitation to Deer Island as envisaged in Option II. A very simple interpretation facility would be adequate in relation to park redevelopment. If Option II is pursued a more extensive interpretative facility would be in order in conjunction with general development of Deer Island Point.

Recommendation: Develop an interpretive facility in relation to Old Sow whirlpool appropriate for the national marine park development option chosen.

If Option I or Option III is pursued, the interpretation facility could be quite modest and include a small observation tower and weatherproof signing in a small pullover. Estimated cost would be $3,000 to cover the tower, signs and landscaping.

If Option II is accepted, the interpretation facility should be more extensive with a more sophisticated facility, a pullover, parking and perhaps look-off aides like direction finders and telescopes. The estimated cost would be $10,000.

6.1.3 Shoreline Hiking Trails

Consistant with the philosophy of providing an array of recreational opportunities is the creation of shoreline hiking trails (and scenic trails). This type of facility will provide recreation to those interested in hiking, retain them for several hours and offer sight seeing and photographic opportunities.

The trails could be laid out on public property or private property made available by individuals/groups, or, in the intertidal zone (which would limit their use). Trails could be developed with private groups or firms in relation to their facilities by provision of financial assistance.

Recommendation: That a system of self-guided shoreline hiking trails be created to offer hiking, photographic and picnicing opportunites.

Options I and III - The hiking trails should be situated primarily on the mainland with minor developments on Deer and Campobello Islands.

Option II - the hiking trails should be spread out over the entire associated area - Deer and Campobello Islands and the mainland.

Estimated costs for development of a trail system would be $25,000 if Option I or III is selected or $50,000 for Option II.

6.1.4 Self Guided Drives

For those individuals who wish to take an inuependent tour of the area but do not wish to hike, a series of self guided drives should be promoted. An obvious advantage of this approach is that it can keep visitors to the area for extra days. Tourists visiting an area with which they are unfamiliar miss many of the attractions simply because they do not get the necessary information.

There are few capital costs associated with this type of attraction. The major costs are associated with research, layout, publication of the pamphlet, marketing and promotion of the materials. A potential means of facilitating this type of activity would be through the sale of "guide cassettes" which visitors could rent or buy to guide them verbally around the circuit. Another possibly is the creation of a low power radio station in the area which would broadcast tourist programming during park visitation periods. This will be explained later in the chapter.

Recommendation: Develop self guided drives in the area to include Deer and Campobello Islands and the coastline.

The package and the associated costs would be much the same whether Option I ,II or III is pursued. Exclusive of the low powered radio, the costs would be approximately $10,000 to include research, layout, publications and production of cassettes. As there would be revenue associated with this concept it would be a good project for a Chamber of Commerce, Tourism Association or public group.

6.1.5 St. Croix River

The St. Croix River forms part of the international border between New Brunswick and the State of Maine and empties into Passamaquoddy Bay. The River is the location of significant canoeing, fishing and camping activity and has been nominated by the Province to the Canadian Heritage Rivers System. Once accepted this river will be recognized and promoted nationally and internationnally and will draw visitors.

In terms of the national marine park project, existance of this attraction and access through canoe rentals may keep visitors in the area longer. It will also provide a specific recreational opportunity (canoeing).

6.2 Historical/Cultural Attractions

Historical attractions are very site specific being limited to the locations of historical facilities or features. They rarely show a profit but they do attract a portion of the tourist population and add to the attractions base. They are important in contributing to the identity and image of an area and furthering overall theme designations. Historical attractions are primarily in the government domain because of costs and importance to Canadians.

History and culture are impossible to separate. In terms of the plan, local festivals can be cultural events furthering the theme images but not be historical in nature.

6.2.1 Indian Island Development

Indian Island is an island of approximately 250 acres located at the southern end of Deer Island in Head Harbour Passage. This Island has a great deal of historical significance in this part of eastern Canada with known historical resources pre-dating the arrival of European settlement.

The pre-European historical resources are primarily in the form of shell middens.

In terms of European history , the Island was probably first sighted by the ill-fated Champlain/DeMonts expedition of 1605 which resulted in the over-wintering settlement on St. Croix Island. In the subsequent one hundred and sixty years Indian Island was occuped at various times by Indians, the French and seasonal fishermen who used it as a staging area to pursue the fishing industry. In 1765 a permanent settlement was established by James Chaffey who pursued various activities including fishing and shipping. At its peak this community had commercial links with London, Halifax, Boston and the Caribean. Well preserved remnants of this settlement remain today in the form of the Horatio Chaffey house built in 1820 (son of James Chaffey) and several other residences, some of which may predate the Horatio Chaffey estate. These buildings are now only occupied seasonally and the entire settlement is privately owned.

Recommendation: If development of the proposed national marine park proceeds, it is strongly recommended that development of the Chaffey settlement be pursued as a tourist attraction.

Whether Option I, II or III is pursued is irrelevant to the designation of the area as a historic site. Access would be by boat only so that access to Deer and Campobello Islands is not necessary. There would be little point in significant development without the presence of a national marine park. Development is, in some respects, dependant upon greater visitation to the area and could be pursued by the private sector or a community group.

6.2.2 St. Croix Island

St. Croix Island is located in the St. Croix River opposite Lower Bayside on the St. Andrews Peninsula and is part of the State of Maine. Also known as Dochet's Island, it is the location of the site where the Champlain and DeMonts expediton over-wintered prior to moving on to Port Royal in 1604. The site was recently designated as in international historic site.

At present on the Canadian side, this is simply a sign indicating the existance of the Island as a National Historic site.

Recommendation: That the appropriate interpretive facilities be developed of a visitor interpretive centre adjacent to Route 127 (access road to St. Andrews) to allow visitors to stop and appreciate the historical significance of the site.

This recommendation are relevant regardless of which Option is pursued or whether a national marine park is developed or not.

6.2.3 Ministers Island

Minister's Island is located adjacent to St. Andrews and is the site of the Van Horne Estate. Formerly owned by W.C. Van Horne, developer of the CPR, as a summer retreat, it is now owned by the Province of New Brunswick. The Island contains several significant structures and a natural area. It is connected to the mainland by the Bar Road, a road that is submerged at high tide.

At present no development plan exists for the Island although the Province of New Brunswick is investigating several development alternatives. The buildings are being maintained by the Province and a fulltime caretaker is employed on the site.

Should a national marine park be developed in the West Isles, development of Ministers Island could greatly add to the attractions base in the area and provide a significant draw to St. Andrews. Particularly if Option I or III is pursued and most of the visitation to the Park concentrated on the mainland, the Ministers Island facility would be very relevant. If Option II is pursued the facility would be relevant but to a lesser extent.

Recommendation: That if a national marine park is developed in the West Isles, development of Ministers Island be pursued complementary to the national marine park.

6.2.4 Roosevelt/Campobello International Park

Located on Campobello Island, Roosevelt/Campobello International Park is a historic facility dedicated to the memory of U.S. President Franklin Delano Roosevelt and the relationship between President Roosevelt and Campobello Island.

Roosevelt/Campobello International Park is mentioned in this plan in recognition of its importance as a tourist draw to Campobello Island and its contribution to the attractions infrastructure of Charlotte County.

If Options I or III are pursued for national marine park development visitation to the Roosevelt estate will have little effect upon visitation to marine park facilities unless private efforts are made to take advantage of Campobello's close proximity to the park area. This will present various commercial opportunities particularly in the area of boat charters and catering to scuba divers.

If Option II is pursued with its inherent facilities on Campobello Island, close cooperation between Parks Canada and the management of Roosevelt/Campobello International Park would maximize benefits to the community and minimize negative effects.

6.2.5 Festivals/Events

Festivals, as currently exist in the Province of New Brunswick are essentially cultural and recreational celebrations aimed at heightening community awareness and spirit, at celebrating signifient aspects of local community life, and providing a tourist draw.

In the immediate area of the proposed park the following festivals took place in 1984 according to the 1984 Calendar of Events published in the Tourism New Brunswick 1984 Travel Guide:[1]

1. July 6-7 St. Andrews 11th Annual Antiques Show and Sale
2. July 12 St. Andrews Arts and Crafts Fair
3. August 5-12 St. Stephen /Calais International Festival
4. September 19 St. George R.C.M.P. Band Concert

In addition there are regular arts and crafts exhibition in St. Andrews particularly at Sunbury Shores Arts and Nature Centre (which will be dealt with later in this chapter).

1. Note: Bicentennial events are not listed as they will only occur in 1984.

From the above list is is obvious that the accent of festivals in the area has not been towards the area's prime resources - the sea and the fishing.

The following criteria should be considered in staging festivals and similiar events:

1. The festival should be associated with signifient local resources and the themes that are being promoted.
2. The location of the festivals must be relative to the resource but must also consider accommodation, services and access.
3. The timing of the festival/event must be such as to take advantage of peaks in visitation while not conflicting with other festivals and events in the province.

Establishment of a national marine park in the West Isles would present a tremendous opportunity for local communities or groups to schedule a major festival related to the marine environment, both above and below the water surface, and the fishery. In addition, special events or mini-festivals could be scheduled on strategic weekends to draw visitors. If Option I or III is pursued the major festival should be centered in St. Andrews but could have additional events in St. George and on Deer or Campobello Islands. If Option II is pursued St. Andrews would still be a prime location for a festival but consideration could be given to Campobello Island.

Recommendation: That an annual marine festival be established potentially in St. Andrews to celebrate and promote the marine environment, the fishery and scuba diving.

Recommendation: That specific scuba diving events be created on several long weekends, say Canada Day and Labour Day, to promote diving in the West Isles Area.

The annual marine festival should be a week long event scheduled on one of the two last weeks in July to take advantage of traditional peak visitations to the province and optimum weather conditions. It should be sponsored and organized by either a municipality or interest group (Chamber of Commerce, for example). The event can be centered in one community with additional events organized by groups in the local area.

In the past there have been long weekend gatherings of divers in the province which have attracted 100-200 divers. A relevant and specific example is the Labour Day Dive Meet on Deer Island, formerly organized by a provincial dive club. The meet has not been held in recent years because the decline of the organizing club. These meets were successful in attracting provincial divers and it would not be difficult to expand this event to include divers from adjacent provinces and states.

Initially there would be costs associated with the proposed festival and the dive meets but these costs would be eventually met with revenues as the events built up a reputation and a clientele.

6.3 RECREATIONAL ATTRACTIONS

Recreational attractions are essential to the total tourism development package in relation to the development of a national marine park in the West Isles area. The accent in national parks is on conservation of resources and preservation for use by future generations. Accordingly, facilities tend to be only adequate to allow use and appreciation without catering to the recreational requirements of visitors. It must be recognized that although this approach may satisfy the purist it is frustrating to many visitors who want a varied and multi-faceted experience. This is particularly true for travelling families with small children.

A national marine park will draw visitors to an area but recreational facilities are a necessary part of the package that will keep them in the area. The development of recreational facilities presents the maximum opportunity to the private sector in that most recreational facilities would be revenue generator.

6.3.1 Deer Island Point

Deer Island Point, on the southern tip of Deer Island, is presently the location of a campground/picnic area owned and operated by the Deer Island Development Association (D.I.D.A.). The site was apparently originally intended as a day use area for Island residents but has evolved over the years into a combination campground/day use area.

Although the site is a superior location, the campground is poorly laid out, run down and has inadequate water, comfort station facilities and maintenance. Management of the campground is marginal and suffers from a chronic lack of funds. Despite this, the campground is quite popular and experiences relatively good occupancy.

Whether Option I, II or III of marine park development is pursued, redevelopment of Deer Island Point is necessary.

Recommendation: Option I or III- That Deer Island Point continue in its current multi-functional role.

Option II - That Deer Island Point revert to its original day use role and an appropriate campground facility be constructed at an alternate Island location.

If Option I or III is pursued and the appropriate recommendation followed, it is estimated that costs associated with re development of the site would be in the order of $300,000 including campsite development, comfort stations, roads, dumping station, playground, kiosk/campground store, tables and equipment and landscaping.

If Option II is pursued costs associated with conversion of Deer Island Point to day use and the construction of a new campground would be of the magnitude of $175,000 for the conversion and $750,000 for a new campground.

6.3.2 Campobello Golf Course

At present there is a nine hole golf course located at Herring Cove Provincial Park on Campobello Island. It is operated by the New Brunswick Department of Tourism.

If Option II is pursued and particularly if private development on Campobello Island proceeds as predicted by the promoters, consideration should be given to expanding this course to eighteen holes. If Option I or III is pursued, expansion of the golf course will not be as necessary.

Recommendation: That the feasibility of expanding the golf course in Herring Cove Provincial Park be investigated if Option II of marine park development is pursued.

6.3.3 Improved Dive Sites

The creation of a national marine park in the West Isles would highlight some of the finest scuba diving opportunities in Atlantic Canada if not the Eastern Seaboard. In the designated diving areas within the marine park, however, most of the dive sites are boat access only at an intermediate or advanced level. What is needed is an inventory of shore access dive sites and sites suitable for novice divers. There are many areas that meet requirements on Deer and Campobello Islands and particularly along the shoreline of Charlotte County. Consideration would have to be given to effects on the site of tide, currents and surf.

In addition to mapping an inventory of shore access sites, there is also the potential for man-made improvement to a select few in strategic locations. Man-made improvements could include the sinking of old and no longer used boats of various sizes in sheltered coves or areas where shore access is possible and where the "wrecks" would not pose hazards to navigation. Another type of man-made improvement would be the creation of artificial reefs in presently uninteresting areas. The sinking of boats in sheltered sites has been used with great success at Fathom Five Provincial Park in Ontario (Big Tub Harbour). Strategic locations would be those on shoreline adjacent to service areas or campgrounds which would encourage visitors to stay longer.

Recommendation: That an inventory be carried out of potential shore access sites in Charlotte County and a comprehensive brochure be published to promote them.

Recommendation: That several man-made diving attractions be created to present novice diving opportunities and interesting sites.

The costs associated with the shore access site research would be approximately $20,000 and the production of the first run of the pamphlet would cost $40,000. The cost of the man-made dive sites would vary with the availability of old boats and the costs of preparation.

6.3.4 Competitions

Competitions are a form of attraction that appeal to very specialized portions of the visiting public and do not have a broad general appeal because of the specialized skills, equipment, or aptitudes required for participation. They do, however, cultivate a faithful following assuring annual visitation and the participants will often bring along friends, family and spectators.

In Charlotte County there are various possibilities for competitions which can be part of the whole attractions package. As mentioned in section 6.2.4 dive meets are a common attraction to the diving community. These meets can be self financing, particularly once they are established, through entry fees and offer prizes for such events as underwater scavanger hunt, scallop hunt or diving skills. The status of the St. Croix River makes it an obvious choice for a canoe race. There is also the potential for dory races, hand lining contests, sailing and windsurfing races or any other form of competition which will involve popular recreational pursuits and cater to the individual competitive sprit.

These competitions can be organized by provincial, regional or local sport bodies, municipalities, public organizations and local entrepreneurs who may wish to center promotions of their particular facility around some competition.

Recommendation: That competitions be organized and promoted particularly in relation to the marine environment.

6.4 EDUCATIONAL ATTRACTIONS

An educational attraction is a very specialized form of attraction which is entirely consistant with the philosophy of national parks, marine or terrestrial. It would involve the provision of courses of study, learning oriented camps, and learning opportunities related to the natural, cultural and historic resource base of the area.

This type of attraction does not draw the typical tourist who is simply sightseeing or visiting friends or relatives. It draws visitors with very specific interests who are willing to pay course fees and spend time to further their education.

To a certain extent this is being offered already in Charlotte County. Sunbury Shores Arts and Nature Centre offers a variety of arts, crafts and nature oriented programs of various lengths. The Huntsman Marine Laboratory offers educational and laboratory facilities to visitng university students from Eastern Canada. Several private entrepreneurs in the local area are already offering marine mammal observation tours.

The creation of a national marine park in the West Isles would focus international attention upon the natural resources of the area. This "free" promotion of the area attributes should be taken advantage of. The use of the proposed park area for educational and interpretative purposes would be entirely consistant with national parks policy

The types of educational attractions could include marine resources courses, bird watching, marine mammal observation, diver oriented courses, outward bound survival-type camps, oceanographic tours, sailing, windsurfing and others.

6.4.1 Sunbury Shores Arts and Nature Centre

Sunbury Shores is a local non-profit community organization which, for the past several years, has offered a variety of arts, crafts and marine ecology courses to the public. Based in St. Andrews this group has worked closely with the Huntsman Marine Laboratory and the Fisheries Research Station in the creation of a week long course called "The Sea & Shores of Fundy" which introduces participants to the ecology of the Bay of Fundy complete with a comprehensive field trip program.

The creation of a national marine park would generate a great deal of interest in the area which would serve to increase the number of potential clientele upon which groups like this can draw.

Consideration could be given to sub-contracting for interpretive services within the national marine park to organizations such as Sunbury Shores.

Recommendations: That local organizations such as Sunbury Shores Arts and Nature Centre be encouraged to broaden their course content as the park develops, reputation and international exposure increases and as facilities become available.

6.4.2 Hunstman Marine Laboratory

The Huntsman Marine Laboratory, located in St. Andrews, adjacent to the Fisheries Research Station is an educational facility supported by various universities in Eastern Canada. It offers students, not in close proximity to the ocean, the opportunity to carry out field work in the marine environment. The facility offers residential services and also has a marine aquarium open to the visiting public every summer. The Laboratory works closely with the Fisheries Research Station in the provision of expertise.

The Huntsman is currently undertaking a fund raising campaign to finance a major expansion of their facilities. These expanded facilities as contained in their development proposal would be very complementary to the proposed national marine park development.

Recommendation: That the role and size of facilities at the Huntsman Marine Laboratory be studied in relation to the development of the proposed national marine park to assure maximum effectiveness of the facility.

6.4.3 Marine Tours

At present whale watching tours are carried out from Grand Manan in conjunction with the Marathon Inn. These tours are extensively promoted and subscribed to. Whale watching tours are also carried out on an occasional basis through Sunbury Shores in St. Andrews and occasionally by a boat tour operating out of Deer Island.

Should the national marine park be created, the accompanying publicity and increased visitation would make feasible a significant expansion of the educational marine tours. If Option I or III development is pursued such tours should be offerd on a regular basis out of St. Andrews. If Option II is taken such tours could pick up clientele in St. Andrews, Deer Island and Campobello Island.

Marine educational tours could be changed seasonally to suit the changing resource base. This would allow interested clients to participate in whale, porpoise and seal watching and bird watching.

6.5 COMMERCIAL ATTRACTIONS

For purposes of this study commercial attractions are those facilities which involve exploitation of area resources for revenue generating purposes and cannot be classified as purely recreational.

6.5.1 Campobello Development Company

- Approximately four thousand acres of land on Campobello Island was purchased by a group of investors, the Campobello Development Company, for purposes of developing the recreational and tourism potential of Campobello Island. The Company has subdivided the property into cottage lots and already sold a significant number of them.

- More significant in terms of the national marine park project is the Company's total development package in which they propose such facilities as a major hotel (motel) rental cottage facility with a restaurant and a marina development. These developments would contribute substantially to the service infrastructure in the immediate park area.

- Creation of a national marine park would also present a significant market opportunity for the Campobello Development Company and they would be in an excellent position to cater to visitors to the proposed park.

Recommendation: That proposed developments on Campobello Island be integrated into the Park planning process to assure maximum benefits.

6.5.2 Lobster Pounds/Aquaculture Facilities

On Deer Island there are several unique fishery based commercial attractions. Several lobster pounds are used to hold hundreds of thousands of pounds of lobster prior to their sale in the New England market each year. Most of the lobsters come from Newfoundland, Nova Scotia and the Magdellan Islands.

These massive structures are basically large fenced-in tidal areas. The lobsters are quite visible on the bottom. The facilities would certainly be of interest to visitors and would also provide an opportunity to sell lobsters directly. The costs associated with providing visitors the opportunity to view the pounds and with selling the product would be relatively low.

A significant number of pens are located in the waters adjacent to Deer Island as part of an aquaculture venture involved in salmonid culture. These would also be of intrest to tourists. A demonstration pen could be located so as to give easy access and visitor circulation. An opportunity would also be presented to market salmon directly to the public.

This particular attraction would be more appropriate if Option II of national marine park development were pursued.

Recommendation: That consideration be given to providing access to lobster pounds and salmon pens to tourists and to the direct marketing of lobster and salmon to visiting tourists.

CHAPTER 7

7. SERVICE INFRASTRUCTURE

Service infrastructure encompasses all those facilities which are not attractions but which are necessary to cater to tourists' material and comfort requirements. It includes for example accommodation, restaurants, retail outlets and diver services.

It is particularly in the area of service infrastructure where there are private sector opportunities which offer the major benefits of this national marine park in terms of revenue and employment. These private sector opportunities would for the most part be seasonal and would involve private sector investment and initiative.

Service infrastructure is one aspect of the project for which the development option chosen will have significant implication. If Option I or III is pursued there will logically be little requirement for service infrastructure on Deer and Campobello Islands in relation to increased visitation caused by the creation of the marine park. The obvious location for all facilities would be in St. Andrews and St. George given the existing extensive facilities in those communities. This does not indicate that developments would be inappropriate outside these municipal areas, but rather that they would build upon the existing infrastructure. If Option II is pursued, there would still be a requirement for development in St. Andrews and St. George but the distribution of visitation would cause developments to be better spread out over the mainland, Deer and Campbello Islands.

7.1 Accommodations

The subject of accommodations includes roofed accommodation such as hotels, motels, cottages, guest houses, country inns and bed and breakfast establishments as well as campgrounds. The whole spectrum of accommodations is critical to the potential success of the national marine park project. Without adequate accommodations, it will matter little how good or how many are the attractions. Tourists will simply not stay. The word "adequate" also implies a range in price as well as quality to cater to all segments of the visitor population. It also relates to good value for money paid.

As indicated in Section 2.1 Charlotte County has a total supply of roofed accommodation of 794 units contained in 49 establishments (peak season). However, for purposes of this analysis, the figures for Grand Manan will be dropped giving an effective total of 685 units in 35 establishments.

The figures for Grand Manan are dropped from this analysis because they would unduly bias conclusions. The difficulties of access to Grand Manan remove it from the effective supply which would service visitors to the proposed national marine park. It is highly unlikely that visitors would use Grand Manan as their headquarters while visiting the national marine park either by boat or motor vehicle.

The visitation increases resulting from the establishment of the proposed national marine park in the West Isles as projected in the Socio-Economic Study are best described as a "zero base case." They presume that the existing ferry connections to Deer Island, particularly that between Letete and Deer Island, are presently operating at capacity and, thus would not allow any increased visitation to Deer Island. The presumption is that visitation to facilities on Deer Island would be only be by the number of tourists presently using the ferry system - thus no incremental visitation.

For purposes of this accommodation analysis, capacity improvements to the ferry system will be presumed. In addition, particularly, with Option II, it will be presumed that those tourists presently visiting Deer Island will stay on the Island in increasing numbers because there will be services and attractions to keep them there.

Table 10: Green Point/Option I Incremental Visitation

	Year									
	1	2	3	4	5	6	7	8	9	10
Total Season Increment(000's)	-	0.8	1.8	3.7	5.8	9.3	13.0	17.2	20.7	22.8
Total Annual Increment (000's)	-	1.1	2.4	4.9	7.7	12.4	17.3	22.9	27.6	30.4

Table 11: Deer Island/Option I Incremental Visitation[1]

	Year									
	1	2	3	4	5	6	7	8	9	10
Total Season Increment(000's)	-	0.4	0.9	1.9	2.9	4.7	6.5	8.6	10.4	11.4
Total Annual Increment (000's)	-	0.6	1.2	2.5	3.9	6.2	8.7	11.5	13.8	15.2

If Option I or III is chosen as the development option, the implications in terms of incremental visitation to Deer Island are almost impossible to quantify. Although most of the reception facilities would be concentrated at the extreme north end of the park there would be some access to the site from Campobello particularly in relation to the Campobello Development Co. development on the Island.

Table 12: Green Point/Option II Incremental Visitation [2]

	Year									
	1	2	3	4	5	6	7	8	9	10
Total Season Increment (000's)	-	0.5	1.3	1.9	2.8	3.8	4.9	6.1	7.0	7.8
Total Annual Incremental (000's)	-	0.7	1.8	2.5	3.7	5.2	6.5	8.1	9.3	10.4

[1]For purposes of the accommodations exercise it is presumed that 50% of the incremental visitation to the Green Point Visitor Reception Centre in Option I will want to travel to Deer Island and that the ferry system will be expanded to accommodate them.

[2]The facility to be located at Green Point under Option II development would be minor but would attract a number of visitors, 80% of whom would continue on to Deer Island.

Table 13: Deer Island/Option II Incremental Visitation

	Year									
	1	2	3	4	5	6	7	8	9	10
Total Season Increment(000's)	-	0.4	1.0	1.5	2.2	3.0	3.9	4.9	5.6	6.2
Total Annual Increment (000's)	-	0.6	1.4	2.0	3.0	4.2	5.2	6.5	7.4	8.3

Table 14: Campobello Island/Option II Incremental Visitation

	Year									
	1	2	3	4	5	6	7	8	9	10
Total Season Increment (000's)	-	1.0	2.6	3.8	5.5	7.6	9.7	12.1	13.9	15.5
Total Annual Incremental (000's)	-	1.3	3.5	5.1	7.3	10.1	12.9	16.1	18.5	20.7

It should be noted that Tables 11 and 13 are at variance with the zero base projections of the socio-economic study. They represent estimates of incremental visitation to the respective areas based upon improvement to the ferry system between Letete and Deer Island.

The existing visitation to Deer Island is approximately 15,000 people during peak season and 20,000 people annually.

Deer Island presently has a total of 2,392 room-nights of accommodation (13 rooms x 184 nights May-October) available. At a May-October occupancy rate of 40% (best estimate) this gives a total of 1,435 room nights available.

Campobello Island has a total of 5704 room-nights of accommodation (31 roomss x 184 nights) available during the peak season with ten of these rooms open year round. Applying the present 40% occupancy during the peak period, this gives a total of 3422 room nights available. It should be noted, however, that the Campobello Development Co. is proposing to build a major accommodation facility on the Island and this would significantly alter the number of rooms available.

In addition there are existing campgrounds on both Deer and Campobello Islands which operate at varying levels of occupancy. A portion of the overall visitation would use roofed accommodation while the remainder would patronize campgrounds.

Given the quite tentative nature of the projected visitation figures it would be impossible to give reliable expectations for increased requirement for roofed accommodation and campsites. Such speculation might unduly increase expectation of prospective entrepreneurs.

Recommendation: It is recommended that at Year 3 of park development under either Option I, II or III that a comprehensive accommodation needs study for the Fundy Isles Tourism Destination Area be undertaken on the industries previous three year performances. In this study, specific occupancies for Deer Island and Campobello Island as well as real experienced visitation figures can be used. At this point it will also be clear what improvement to the ferry system has been undertaken.

7.2 Restaurant/Food Sales

There exists the full spectrum of outlets in Charlotte County selling prepared foods to the general public. These include formal restaurants, snack bars, roadside takeouts, over the counter sale of prepared seafoods, health food and deli type establishments. They vary greatly in quality, price and distribution.

In Section 2.4 it is indicated that in Charlotte County there are a total of 39 restaurants where visitors can sit down to have a meal. It should be noted that 15 of these occur in St. Stephen and 10 in St. Andrews. Subtracting these and further discounting the 5 at Grand Manan, it should be noted that the rest of Charlotte County has a total of 9 restaurants. Deer Island has a restaurant and Campobello 3.

It is quite obvious from the projected increases in visitation that, should the marine park proceed, there would be opportunities for private entrepreneurs to open up new restaurant food outlets particularly in St. George, Back Bay/L'etete, Deer Island and Campobello Island. For the most part capacities are adequate in St. Stephen and St. Andrews regardless of the park development option chosen. If Option I or Option III is chosen there would be opportunities in St. George, Back Bay and/or Letete. If Option II is chosen there would be additional requirements on Deer and Campbello Islands with a high priority attached to Deer Island.

In terms of sit-down restaurants it is esssential that attention be paid to price and quality. St. Stephen, St. Andrews and Campobello Island are all located with easy access to the State of Maine where prices are modest and competition stiff. If prices in the three locations mentioned are too high, American entrepreneurs will reap the benefits of the increased tourism traffic. This is particularly important in the case of Campobello Island where Lubec, Me. is minutes away. It is equally important that the quality of food prepared be high. Restaurants outside the St. Stephen and St. Andrews area are pedestrian in quality, offer few innovations in their menus, do not prepare the menus they do have particularly well and have indifferent service. Tourists will not accept these factors. They will simply not return and, even worse, will spread the word with other potential visitors.

In addition to the 39 sit-down restaurants found in Charlotte County there are a large number of snack bars and road side take outs offering a uniform menu of fried fast foods. They vary in quality from offensive to a very few which might be classified as very good. This type of fast food outlet has its place in the scale of services but accent must be an cleanliness, quality, price and service. In mainland Charlotte County there is little need for any more of these establishments. On Deer Island, particularly if Option II is chosen, there would be a definite need to at least upgrade the quality of take-outs currently located there. The situation would be similar on Campobello.

In the St. Andrews area there are several small shops which sell specialty foods, deli products and health foods. They offer excellent products at average prices. This type of food outlet should be encouraged throughout the area should park development proceed.

In St. Stephen and St. Andrews it is possible to buy fresh cooked lobster over the counter as well a varying selection of other fresh seafood products i.e. clams, smoked fish, periwinkles, fresh fish, etc. There are no obvious outlets for these products in St. George, Back Bay, Letete, Deer Island and Campobello Island. If the park is established it is essential that there be a broad general availability of these products. If Option I is chosen there should be such an outlet in St. George and Letete or Back Bay. If Option II is chosen there should be such an outlet on each of the Islands.

Recommendation: 1. That the private sector be encouraged to create sit-down restaurant services be increased in St. George, Letete or Back Bay particularly if Option I is chosen.

2. That such restaurant services be increased on Deer and Campobello Islands if Option II is pursued.

7.3 Diver Services

From the socio-economic study carried out by D.P.A. Consulting under contract to Parks Canada the following estimates of diver use of the national marine park are drawn.

TABLE 15: DIVERS (D.P.A.)

	1	2	3	4	5	6	7	8	9	10
Divers	300	400	600	800	1000	1200	1440	1728	2073	2488

These figures are quite modest for the type of attraction planned, for the international profile the area will have, and in view of the number of diver certifications annually in what is perceived as the market area. The only comparable attraction in Canada is Fathom Five Provincial Park in Ontario at the tip of the Bruce Peninsula. This park attracts approximately 8000 divers per annum to a diving resource that is quite modest compared to the diving resources of the West Isles. Fathon Five draws divers from all over Ontario as well as the American east and mid-west.

At present these are approximately 300-500 divers per year visiting the proposed marine park area but this figure is definitely constrained by the availability of boat charters and air station service. Under current conditions, the number of divers would increase to approximately 600 if there were boat charters readily available and advertised. As indicated in Section 3.2, there are approximately 12,000 new divers certified annually in Eastern Canada and another 29,000 certified yearly in New England for a total of 41,000 new certifications each year in the market area. Even given that there is a high dropout rate in the sport for a variety of reasons, there are a substantial number of new divers added each year to the market group.

As a result, a more appropriate estimate of diver visitation assuming establishment of the park and the related service facilities is shown on the following table:

TABLE I6: DIVER VISITATION PROJECTIONS

	Year 1	2	3	4	5	6	7	8	9	10
In-Province	480	900	1260	1560	1800	1980	2100	2340	2480	2520
Out of province	120	300	540	840	1200	1620	2100	2860	3720	4680
Total Divers	600	1200	1800	2400	3000	3600	4200	5700	6200	7200

Note: - Visitation will increase by 600 per year for years 1-6 based on the proposed implementation schedule which has construction of major visitor facilities in Years 5 and 6. This visitation will be stimulated by the declaration of the park and successful marketing and promotion. After year 6 diver visitation will increase by 1000 per year until year 10 due to the improved facilities and increased marketing.

- Unknowns which may effect these figures include political stability in southern dive locations, costs of air fares to southern dive locations and the strenyth of the Canadian dollar.

- In-province divers will constitute 80% of the diving visitors in Year 1, 35% in year 10. Conversely out of province diver will represent 20% in Year 1 and 65% in Year 10.

In the Province of New Brunswick there exist a limited number of full-service dive shops, that is to say, dive shops which offer the whole spectrum of services including air, sales, rentals, repairs, diver instruction and certification and diver excursions. Only one of these shops is in the southern part of the province and it is in Moncton, far enough away to be of no impact on the proposed national marine park. In the Charlotte County area exclusive of Grand Manan, the only diver "outlets" are three air stations - one at St. George one at Bocabec and one at Sealy's Cove. The Sealy's Cove air station is operated as a satellite of the Moncton dive shop and offers limited rentals and sales. It is also the only inspected air station in the area.

If it is decided to proceed with the development of the proposed national marine park particularly with Option III there would be immediate need for an air station offering limited sales and rentals in the St. Andrews area. This store could evolve into a full-service eight month per annum operation by Year 5. If Option I is followed an air station would also be required in the St. George/Back Bay/Letete area. If Option II is followed, air stations would be required immediately on Deer and Campobello Islands.

TABLE 17: DIVE SHOP PROJECTIONS

In the framework of the projected ten year development of the park facilities, the following dive shop requirements are projected:

Option I -	Year 1	Air Station St. Andrews
	Year 5	Full Service Dive Shop St. Andrews
		Air Station St. George/Back Bay/Letete
	Year 10	(2) Full Service Dive Shop St. Andrews
		Air Station St. Andrews
		Air Station St. George/Back Bay/Letete
Option II -	Year 1	Air Station - St. Andrews
		Air Station - Deer Island
		Air Station - Campobello Island
	Year 5	Full Service Dive Shop - St. Andrews
		Air Station - Deer Island
		Full Service Dive Shop - Campobello Island
	Year 10	Full Service Dive Shop - St. Andrews
		Air Station St. Andrews
		Air Station - Deer Island
		Full Service Dive Shop - Campobello Island
OPTION III -	Year 1	Air Station - St. Andrews
	Year 5	Full Service Dive Shop - St. Andrews
	Year 10	Full Service Dive Shop - St. Andrews
		Air Station - St. Andrews

The air stations could be operated as satellites of the full service dive shops and operating hours could vary as required. It is important that all air stations that are recommended and promoted be inspected and certified annually under the Association of Canadian Underwater Councils (A.C.U.C.) Clean Air Program or some similar program. Nothing will ruin a dive destination like a reputation for bad air. Air station operators must also be required to verify that any diver purchasing air (or life support equipment) possess a valid certification from an internationally recognized diver certification agency such as Professional Association of Diving Instructors (P.A.D.I.), National Association of Underwater Instructors (N.A.U.I.), National Association of Skin Diving Schools (N.A.S.D.S.), YMCA or one of several European agencies.

Dive Shops are the logical places for a visiting diver to sign up for a diving excursion. These excursions will vary from one half day to a full day in length. The dive shop operators can either operate their own boats or engage the services of a local fisherman or charter operator and his boat. One advantage of having a dive shop charter a boat rather than owning their own is that the licensing requirements for the charter boats are less rigid and expensive.

Dive charters to group may also be operated independantly by local fishermen. Little modification to a fishing boat is required. In Year I 600 divers would imply forty charters assuming that 80% of divers would want to access the marine park dive sites, by charter boat and an average boat capacity of 12 divers. With the same criteria, Year 5 would involve 200 charters and Year 10 - 480 charters. Even at current rates each charter is worth an average of $150 - $200 to the boat owner so that in Year 10 there would be approximately $100,000 generated for local dive boat operators for what would for the most part be part time work.

An essential part of promoting diving activity in relation of the national marine park would be the publication of diver guides, sale of marine charts, and identification of emergency services to divers (rescue, decompression facility). These could be sold in local retail outlets as well as at the visitor reception centres.

Hotels, Motels and campgrounds that wish to cater to visiting divers must be prepared to cater also to their special requirements. These include provision of packed lunches and washing, drying and storage facilities for equipment (lockers) These, of course, can also be sources of revenue.

Central to any marketed and promoted dive destination is immediate and close access to a decompression facility. This is especially necessary with deep, cold water. The facility is basically an emergency medical facility and cannot be expected to turn a profit. It should be attached to a local hospital facility and could be run under a doctor's supervision by a volunteer crew much as it is at Fathom Five Provincial Park.

7.4 Craft Sales

An important part of the marketing of the culture and local flavour of a destination area is the sale of arts and crafts products. These products appeal to a significant portion of the visiting population, are labour intensive, and can generate income for people who wish to work in their homes on a part-time basis. Critical to the success of such an industry however are quality, price, uniqueness and distinct local flavour.

At present St. Andrews is the retailing centre for crafts for southern New Brunswick with a large number of stores involved in craft sales to tourists. The crafts offered are only partially local with a predominance of crafts from outside the area and outside the province.

Retail outlets have certain requirements of craft producers. These inlcude consistancy of quality and supply and price. The problems of assuring these requirements are universal to the craft industry acrosss the country. Producers purchase their own materials from whatever sources they can locate and their energies are devoted to production rather than marketing and promotion. There are several organizational options available to such industries. A craft co-op run by the crafts people themselves is one option although the strength of such organizations tends to vary with the leadership and in the independance of the participants. The other option is the creation of a private firm which employs crafts people in their homes on a "piece-work" basis and offers them volume purchasing of new materials, marketing and promotion. Under current circumstances, such an organization would benefit the local craft community. With increased traffic it would become even more appropriate.

It is important that the area market quality, traditional local products if it is to develop a reputation which will draw tourists to the area. Consistant with the marine theme of the park and the local area, consideration should be given to products associated with the sea and the fishing industry. A suitable outlet for such products would be the proposed Fisherman's Village particularly in view of the marketing and promotion implications. If the marine national park is established there will also be opportunity to spread sales outlets throughout the area.

If Option I is pursued there are positive implications for St. George, Back Bay and Letete. If Option II is pursued potential for craft sales would be enhanced on Deer and Campobello Islands as well as on the mainland. Pursuit of Option III would reinforce the existing St. Andrews market.

In conjunction with the organization of the craft industry, considerable attention should be given to the education of local crafts people to improve production techniques, innovation in design and quality of product. This can be done using the resources of the New Brunswick Craft School, the Handcraft Branch of the provincial Department of Historical and Cultural Resources as well as local resources.

Recommendations:

1. That an organization be created to further local craft production and sales in the Fundy Isles Destination Area.
2. That a program of craft education be embarked upon by the Area organization once it is created.

7.5 Local Tours

The provision of local area tours provides a service which better exposes a visitor to an area and makes it easier for the tourist to gain access to those facilities which are the reason for his or her visit. Local tours include the provision of tours to points of interest throughout the destination area, taxi service from the accommodation unit to downtown, water taxi service to islands and facilities accessed by water, airport connections, scenic boat tours and taxi service to wharves for divers going on dive excursions.

The benefit of the provision of such services include longer stay because of convenience, better explanation and exposure to points of interest, making feasible different ways of visiting the destination area and minimizing parking congestion in high traffic areas.

Visitors to an area such as St. Andrews will arrive via a variety of means of transportation such as private motor vehicle, bus and car. They will visit as individuals, couples, small tour groups and bus size tour groups. Those arriving by air (to Saint John or Bangor) and those arriving by rail (McAdam) will require pick-up and return as well as local transportation when they reach their local destination. Bus tours involving full size buses will frequently require local access. It may also be more convenient for individuals who arrive in their own vehicles to take advantage of informed local transportation to get best exposure to the area.

The obvious location for a local tour operation is St. Andrews because of the existing facilities and visitation. In fact, the service exists, at least partially, at present, and would simply need to be expanded. Such an expansion could be justified with increased visitation. If Option II is pursued there may need for a portion of these tour services operating out of Campobello Island in addition to St. Andrews. Water taxi service would be required from Deer and Campobello Islands with Option II and from Green Point if Option I is pursued.

7.6 Marinas

By its very nature, access to the proposed national marine park would be by boat, either private or chartered. Some visitors who would be drawn to such an attraction would arrive by boat (larger sailboats or motor yachts) or would bring their own boat (trailerable). In addition water taxis and boat charters will require pick-up and delivery of patrons at locations other than commercial wharves where they would interfere with the commercial fishery.

These needs would be satisfied by the provision of private/public marinas in the marine park area. At present yachters are warned away from the Passamaquoddy Bay area because of the lack of facilities and services available. Similarly there are no appropriate services at Letete or on Deer or Campobello Islands. A full service marina should provide dock rentals with utilities, sewage pump-out, on-shore facilities such as showers, washrooms, sale of boating supplies, haulout, repairs, fueling, boat ramp and possibly club house facilities.

A marina system plan for the Province of New Brunswick is currently being undertaken by Tourism New Brunswick in conjunction with Small Craft Harbours (federal) to investigate marina needs in the Province. This plan will establish development priorities and needs.

Should the national marine park project proceed, it will be essential that marina facilities be available. The Campobello Development Company has included in its development proposal a marina facility. The presence of a marine park would simply justify a larger facility.

Recommendation: 1. That the results of the Marina System Plan, currently underway, be used to develop priorities for marina development in the general area of the proposed national marine park.

7.7 Retail Outlets

There is presently a wide spectrum of retail outlets in the area influenced by the park proposal. For obvious reasons, they are concentrated in St. Stephen, St. Andrews and St. George. There are also implicated concentration in Calais, Eastport and Lubec which are relevant because of their close proximity to the proposed park area and because of the traditional use of these outlets by area residents particularly from Deer and Campobello Islands.

Retail outlets include clothing, grocery and drug stores and any such facilities which sell a product to the public. Specific types of retail outlets are dealt with separately in this document where they are of particular interest or importance.

Creation of a national marine park would not require the creation of new retail outlets in St. Stephen or St. Andrews. The existing ones would simply enjoy a larger clientele. If Option I is pursued there would be an opportunity to expand retail services in St. George. If Option II were pursued, it would be essential to expand retail services on Deer and Campobello Islands. The alternative to developing these services on the Islands would be to lose many of the employment and revenue opportunities to Eastport and Lubec where visitors would stay and access the park by boat as day use visitors.

There will be a need to supply some specialized retail services to the public should the proposed marine park be created. These specialized services would include same-day photo finishing, sale of camper supplies, sale and rental of foul weather gear and sale of marine supplies and souvenir information relating to the park.

7.8 Vehicle Services

Vehicle services include service stations, gas bar, towing and recreational vehicle services.

At present such services are adequate in St. Stephen, St. Andrews and St. George. However, pursuit of Option II would necessitate a considerable upgrading of such facilities on Deer and Campobello Islands. Vehicle services in Lubec are presently used by Campobello visitors and residents.

7.9 Equipment Rentals

The creation of a national marine park would give rise to some opportunities for equipment rentals. This would include diving equipment as already discussed in Section 7.3, foul weather gear, bicycles/mopeds, boats/wind surfers, and possibly motor vehicles. Particularly if Option II is pursued these rentals (exclusive of motor vehicle rentals) would be appropriate for Deer and Campobello Islands in conjunction with campgrounds or accommodation units.

7.10 Tourist Radio

A concept that should be further explored if either development option is pursued for the marine park is the idea of a "tourist radio". A short-range low-power radio station limited in range to the Fundy Isles Destination Area would be an excellent vehicle to broadcast recorded messages to tourists to keep them posted on current events in the area, attractions to visit, hazards, weather, time and other items appropriate to a successful visit. This information would have to be updated at least weekly and the service would have to be adequately advertised at information outlets as well as entry points.

This type of public service would be appropriate for a municipality or public organization.

8. GENERAL TOURISM DEVELOPMENT

8.1 Public Education

The feasibility of a proposed national marine park in the West Isles is in the process of being determined. The creation of the park would certainly contribute to the success of the tourism industry but it will not assure its success. An essential ingredient is the attitude of the local population towards the park and tourism in general.

It has become quite apparent through the public meetings to date, that there is inadequate appreciation of the potential of the tourism industry in the area. This attitude, in conjunction with a generally pervasive bluntness, could do a great deal of damage to the area's image with tourists who value hospitality, friendliness and helpfulness. Hospitable reception of tourists is essential to the success of the industry in the area.

There would be significant opportunities for income and employment that could arise from the increases in tourist visitation should a national marine park be created. There are several vehicles through which advantages and disadvantages of diversifying the local economy can be fully explored.

1) Store-Front Operation - This is the name given to the concept of a local office which would be located in the area and open, either full or part time, to deal with questions from local residents and to actively participate in an educational process in relation to the proposed park and the tourism industry in general. The office would supply a variety of promotional materials, displays in relation to the project and materials relating to investment opportunities. The staff person would function as a contact point with the project. Another option would be to maintain two or three offices in the area which could be occupied by the individual on a rotational basis. A yearly budget for such an operation could be as follows:

1 person (salary benefits)	25,000
Vehicle	3,000
transportation costs	8,000
Office supplies and costs	4,000
Display and promotional materials	5,000
Office rental (1 office @ 300/month)	3,600
	$ 48,600

2) Education Program - This program would involve the use of personnel resources from a variety of sources as required to hold workshops, public meetings and information sessions throughout the area. It could involve general public sessions and sessions oriented towards specific groups such as the Chamber of Commerce, fishermen's groups, school groups and church groups. The advantage of such a program is that expertise is used from a wide variety of sources to fit demands for information. The disadavantages include less informality, less continuity and access and the need to set up each session individually.

Costs associated with such a program would vary with the number of sessions and the people used and would include travel costs as well as potentially fees for the individual. An estimate would be in the order of $30,000 per annum if the program is pursued with regularity.

3) Familiarization Tours - Familiarization tours, in the context of this document, would involve taking interested groups of individuals on tours to other areas of eastern North America where there are functioning examples of tourism industry similar to that envisioned for the West Isles tourism destination area. As an example, this could involve taking people from Deer and Campobello Islands to Tobermoray, Ontario to view Fatham Five Provincial Park and to discuss the park operations with park authorities and local residents.

Again, costs will vary with the number and length of trips made. An estimate would be $30,000 per annum.

A program involving all three of these vehicles would cost $300,000 (approximately $100,000 per annum and for three years). The costs are not inconsequential but constitute less than 0.5% of the potential capital investment and its associated rewards may not occur without this sort of program.

Recommendation: That a public education program in the West Isles area be undertaken if there is a decision to proceed with the proposed national marine park project.

8.2 Training

It is not sufficient to simply inform people about the opportunities in the tourism industry or to generate enthusiasm for the project and the industry. It is also essential, if the project proceeds, to enable local residents to acquire the skills and expertise necessary to participate in the industry.

This need is already recognized by local residents who have expresed such concerns at several of the meetings already held.

There are several means of accomplishing this end:

1) Educational assistance to existing entrepreneurs - Through existing area businesses, funds could be provided to allow entrepreneurs expand their capabilities and those of their staff in the area of tourism.

2) Canada Manpower - Various job training programs can be offered through Canada Manpower. Fundy Isles residents could be encouraged to take advantage of these programs.

3) Special Programs - Special training programs specifically oriented towards Fundy Isles residents could be set up possibly using the auspices of the local community college.

Program content that would be of interest and appropriate for the project would include:

1) General tourism courses - These courses would deal with a variety of subjects including travel agencies, operation of accommodation facilities, restaurant management, and the general art of dealing effectively with tourists.

2) Seasmanship Courses - These are presently offered through the Department of Fisheries towards improving seamanship qualifications and licensing levels. To operate a charter boat there are certain minimum licensing requirements - an Inshore Master's Certificate. In the interests of public safety and keeping customers happy, skills have to be kept at a high level through updating programs.

3) Diving Industry Courses - Potential courses in this domain of interest to local entrepreneurs would include:

   a) Basic and advanced scuba courses - These courses would qualify individuals as divers and better enable them to understand and promote the resources as well as appreciate their customers' needs. It would also be required for underwater guides.
   b) Dive master - Each dive charter boat must have a qualified dive master who is in charge of administering the dive. Basic and advanced certification is a prerequisite.
   c) Store owners - Courses are available to better enable individuals to operate dive shops.
   d) Instructors - If courses are to be given as part of a package, instructor certification will be necessary.

   Diving courses are available in Canada and in the United States and could be specifically set up as required.

4) Resource Management and Law Enforcement Courses - These courses would be necessary to enable local individuals to seek employment as Park Wardens.

Recommendation: That a comprehensive educational package to be made available local residents, should the national marine park project proceed.

8.3 Financial and Development Opportunities

At present there are a variety of programs at both the federal and provincial government level oriented towards providing capital financing and development counselling to private enterprise interested in expanding or to individuals or firms interested in starting new enterprises.

It is essential that relevant programs be brought into focus such that Fundy Isles residents know of their existance and are able to gain access should they so desire.

Consideration should be given to the setup of a specific financial program for the area should the Park proceed. This could be a 5-10 year program much the same as a federal/provincial sub agreement but an a sub-regional basis and administered by both levels of government.

8.4 Comprehensive Marketing Program

Given the level of investment proposed for the Fundy Isles Destination Area, should the proposed national marine park proceed in conjunction with the existing comprehensive infrastructure, it is essential that a detailed and aggressive marketing program be implemented for the area. To date, tourism marketing and promotion planning has been detailed at a provincial level or suggested in broad terms in regional tourism development plans. What would be needed in the Fundy Isles would be very specific to this area. This program could be carried out with the support of the Department of Tourism or by that agency.

Entrepreneurs, in conjunction with the appropriate government agencies, must also undertake significant specialized marketing aimed at the diving market in Eastern Canada and the New England states. This should include participation in dive shows to acquaint divers with the area and sell tour packages. There are only one or two shows in Canada and perhaps three in the Eastern United States that are of interest. Efforts should also be concentrated on advertising and having a regular stream of articles in the two diving magazines in North America - "Skin Diver" in the U.S. and "Dive" in Canada. In addition, area tourism bodies, in conjunction with Tourism New Brunswick, must advertise in various travel and trade publications to assure adequate exposure is given to the Fundy Isles.

Recommendation: That a comprehensive marketing program for the Fundy Isles Destination Area be implemented if the proposed national marine park proceeds.

8.5 Municipal Infrastructure

It has become quite apparent to the project study team and is becoming increasingly apparent to a number of local residents in the Fundy Isles Destination Area that the area suffers from an organizational vacuum as well as local rivalries. St. Stephen, St. Andrews and St. George are incorporated municipal area with elected councils. As such, they can exert control over development of their municipal areas, provide municipal services and present a common and recognized front when dealing with Federal and Provincial governments as well as private agencies. On the other hand the communities of Letete and Back Bay and Deer and Campobello Islands have no such structures. They are thus placed in a position of reacting to proposed changes rather than setting the guidelines which will guide those changes. Furthermore, it is difficult for project proponents and government officials to be able to determine which body is truly representative of the area residents in order to facilitate effective two way communication. No where in the region has the problem become quite so apparent as on Campobello Island where a private developer has purchased a large land holding for development. The residents, because they do not have a municipal structure, have very little to say about what direction development shall take. The same could be true of the Deer Island should the proposed national marine park project proceed.

Recommendation: That Deer and Campobello Islands consider some form of municipal structure through the Department of Municipal Affairs in order to institute zoning and development controls.

If the national marine park project proceeds it is essential that a Park Liaison Committee be formed with representation from St. Andrews, St. George, Letete/Back Bay, Campobello and Deer Islands and specific interest groups such as Connors Brothers to assure adequate broad brush input into the planning and operation of the park. This will open channels of communication and avoid needless misunderstandings.

The role of the Fundy Isles Tourism Association should also be expanded concurrent with park development. This industry umbrella organization could coordinate industry needs and development and provide an effective public voice for the industry.

Recommendation: That a Park Liaison Committee be formed to represent area resident's interests in day-to-day development and management of the park should it be created.

8.6 The Big Picture

As part of the whole development process it is important that the Fundy Isles Destination Area development, including the national marine park, be fully integrated into the provincial tourism industry in order to assure maximum benefits to the province as a whole. This will include playing an active role in provincial associations as well as providing leadership to the industry.

Active liaison must also be formed with the tourism industry in Washington County, Maine if the park development proceeds in order to assure orderly serving of visitors to the area. Due to their unique locations, Eastport and Lubec are in a position to benefit significantly from such a park development. Every effort should be made to assure that proposed developments in Maine are consistent with development in Canada.